NAVY RECRUITING ORIENTATION UNIT

VIRTUAL RECRUITER

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I. TALENT SCOUT/RECRUITER

Develop Prospecting Plans

1. Analyze Assigned Market in STEAM
2. WebSTEAM may be accessed from the Recruiting Quarterdeck or by using Internet Explorer to navigate to:
   a. https://WebSTEAM.cnrc.navy.mil/STEAM/
   b. User must have a COMNAVCRUITCOM user ID, password, and a PKI certificate.
   c. User's guide is located on the WebSTEAM homepage.
3. Crucial Step to be conducted while recruiters are tele-working to ensure all hot zip codes are being identified and penetrated via social networking
4. Identify hot zip codes based on 3-year data

Verify Territory Breakdown

1. Recommend Command leadership review breakdown of areas to be prospected virtually and adjust if required.
2. SOAR - The combination of zip codes and high schools comprise a School of Area Responsibility (SOAR). A NAVCRUITSTA will be broken down into areas equal to the number of recruiters assigned to the NAVCRUITSTA and documented on a "recruiter territory breakdown" sheet, exhibit 030201, in the 1130.8K for each recruiter.
   a. Recruiters shall develop a plan to prospect each assigned market and have planned reviewed and approved by direct supervisor
   b. Determine the best prospecting method for each target market and ensure each recruiter is adequately trained in those skills.
3. Review Strength and Weakness for all prospecting modes on PATE
   a. PATE shall be used to analyze recruiter prospecting and sales performance. Each recruiter, LPO/LCPO and DLCPO shall maintain a monthly PATE sheet data collected from the planner and applicant log(s) via Salesforce.
   b. PATE is required to be updated with current data no later than the second working day of the month. Retain current plus previous 24 months electronically.
   c. Recruiters shall analyze the PATE monthly to provide a quick view of his/her strengths and areas where they need to seek help for improvement.
   d. PATE ACCURACY - Collecting data is meaningless unless it is accurate and used to make the recruiting effort more efficient.

Identify Potential Target Market Centers

1. The SMART system was designed to target quality market centers. It shows where recruiting resources should be focused to achieve the best possible results.
2. High School teams/clubs
    a. It is crucial that you maintain a positive and consistent working relationship with each school in your territory. Establish an electronic school folder on the NAVCRUITCOM SharePoint Portal for each high school and community college in your territory. Maintain these folders for the current plus two previous school years.
        - Utilization of Social Media will be key to ensuring visibility within assigned school. Every opportunity must be taken advantage of to increase knowledge of virtual prospecting and development of area of responsibility
        - Basic Social Media and Recruiting Practices are conducted via Facebook Tuesday's at 1300 and Friday's at 0900 central time.
        - Advanced Social Media and Recruiting Practices are conducted via Facebook every Friday at 1200
    b. Identify and establish COI's by contacting staff to discuss school policies and discuss how the Navy can provide another avenue for success upon graduation. The goal is set as many virtual classroom presentations as possible throughout the school year.
    c. Verify all current contact and online information with the school registrar and personnel in the main office. This is key to allow for easy contact access to staff/teachers through email/social media when trying to schedule presentations.
    d. Verify student contact/Market identification by obtaining school lists from the registrar. Utilize help from the EDSPEC if you run into any hurdles.
3. Local fitness centers
    a. Identify and establish contact with gym staff members. These can turn out to be important COI's when it comes to prospecting for the NSW/NSO program.
    b. Verify all current contact and online information is accurate by speaking with management
    c. Review/attend virtual fitness classes. Many gyms will offer a virtual setting for various fitness classes. This is a prime opportunity for advertising Navy awareness.
4. Community Colleges
    a. Identify important COI's by contacting the Dean of Education. They will provide you a roadmap of staff members that will potentially allow you to conduct "info sessions" to their student body.

b. Verify all current contact and online information with admissions counselors or front office personnel.
c. Connect through virtual classrooms/online chat sessions. Meet and discuss your intentions with Departmental Deans and they will help you with this process.

Set Prospecting Goals

1. Phone prospecting
   a. The telephone is the most efficient prospecting tool.
      - It is convenient, provides flexibility, and gives the recruiter the best chance to contact the largest number of individuals in the shortest amount of time.
      - A positive attitude is of equal importance.
      - Consider every contact a potential contract.
      - Have supporting tools readily available:
        - VALOR Telephone script
        - Contact lists
        - Computer
        - Blueprinting form
      - Establish a relaxed and quiet office environment that is conducive for making telephone calls and minimizes disruptions and distractions.
   b. Identify target market based on NRD/NTAG assigned goals. This shall be done by reviewing the NTAG/NRD monthly Goaling letter. This will provide in detail what the command focus will be for each month. Additionally, the CR's prospecting plan and expectations will be the baseline in which will guide your prospecting efforts.
2. Utilize EZ text
   a. EZ text is a fast and effective way to contact volumes of potential applicants in a short period of time.
   b. Utilize text messaging to follow up and/or confirm appointments

Qualifications

1. PQS
   a. Line items shall be signed off by personnel authorized on the Command Qualifiers list.
   b. Review the CNRC 1500 instruction for guidance on required timelines.
   c. Review the CNRC 1136 instruction for applicable PQS to download electronic PQS documents
   d. Contact Command Trainer for scheduling PQS Board
2. JQR

   a. Line items shall be signed off by personnel authorized on the Command Qualifiers list.
   b. Review the CNRC 1500 instruction for guidance on required timelines.
   c. Review the CNRC 1136 instruction for applicable JQR to download electronic JQR documents
   d. Contact Command Trainer for scheduling JQR Board
3. Video Board
   Boards can be held virtually from anywhere with a reliable internets source and capable media device in accordance with command policies.

Prospecting

1. Prospecting includes Personally Developed Contacts (PDCs), telephone, referrals, leads, online applicants, social networking, etc.
2. Establish prospecting goals
   a. Identify and utilize your best prospecting mode(s) that fit your strengths.
   b. Set attainable individual prospecting goals (IE number of records to call/ people to add to your social network/ EZ texting/ FB messaging/new RD contacts/ etc.)
3. Setting the appointment
   a. Avoid selling the Navy over the phone/social media/email or text. The goal is to set an appointment, so only provide enough information that will generate interest in learning more in a virtual interview setting.
   b. Confirm appointment date/time by sending a follow up text or call 24 hours prior to the scheduled interview.
   c. Utilize video chat/conferencing on approved platforms to maximize attendance in a virtual setting. Confirm with applicant which video conferencing application will be utilized for the interview. Make sure sound and visual settings are clear on both your device and theirs.
4. Conducting the interview
   a. Test device and electronic equipment prior to conducting video chat interview to alleviate any technical difficulties. You do not want to look unprepared allowing them to lose interest in what you have to say.
   b. Prepare sales material in advance for the interview based on your initial conversation with the applicant. If there is a mutual acquaintance or if the person being interviewed is an RD, invite the referring future sailor or mutual acquaintance to the call after gathering private blueprinting data. Ensure privacy is extended when conducting an interview (both online and in person)
   c. Invite applicant to have guests attend the call. This should include any person of influence, verify if they have the authority to buy.

Canvass Areas of Responsibility (AORs)

1. Identify "HOT" zip codes
   a. Utilize STEAM/ASAD reports to identify where the highest propensity to enlist exists in your assigned territory. This is where you calculate total DOD contracts in a zip code to identify where people are most likely to join. You may discover that another military branch has a higher DOD take than the Navy. This may signal that you need to target more of your time to this particular area/zip code(s).
   b. Develop COI's and identify target market centers in these areas. Utilize all resources to help generate Navy awareness and utilize your new COI's to promote your name and contact information in the area. Utilize social media as a way of identifying and establishing contact with the new COI and utilize video chat as a way to establish a face to face virtual meeting in order to build rapport and to give them direction on how the relationship can be mutually beneficial.
2. Refer to community calendars of events
   A simple google search will allow you to discover an array of local virtual community events and festivities scheduled for your area. Once you have identified what the upcoming events are, contact the NTAG E-talent director, NRD MAO, and/or social media department.
3. Virtual School Development
   a. Identify Tier 1 and 2 High schools by contacting the EDSPEC to obtain a tier listing or inquire where the command's tier list school directory can be found.
   b. Prepare in advance prior to prospecting from any school by visiting the school's webpage. Navigate through the pages, as they all will have a unique set-up but the goal is to discover names and contact information for individuals such as:
      - Principal
      - Teachers
      - What affinity clubs do they have and who are the Presidents or POCs?
      - What after school organizations exist and who are the POCs student/staff?
      - School Colors and Mascot
      - School Social Media presence
      - The more you know about the school and can verbally articulate, the more willing the staff and students will be willing to accept your presence.

Telephone Prospecting

1. Proficient in Phone Script

Practice and utilize the phone script to develop fluency; expect rejection and understand how to overcome it. Reference and Utilize the 4 R's of VALOR when handling applicant objections

2. Applicant Referral Prospecting
    a. Ask for referrals during conversations. Provide the "What's in it for me" for best results.
    b. Establish lasting relationships by continuing to follow up even when there is no commitment. An applicant referral can be a source of many other COI's and RA opportunities.
3. Handling Objections on the phone
    a. Identify potential objections in advance and be prepared to utilize personalized empathy statements and reference the 4 R's when handling applicant objections.
    b. Ensure information you are using is relevant to the situation you are addressing. Applicant will usually display minor resistance but it is up to you to be ready and have an immediate response in handling their objection. The objective is to keep the prospect talking as long as possible. The longer they talk, the more the odds swing in your favor of obtaining an appointment. Be persistent but not pushy. Be aggressive but not aggressively desperate.

Recruiting Referrals

1. DEP Referral Prospecting
    a. Providing the WIIFM by utilizing Pay chart, Advancement time tables, etc.)
    b. Utilize ARM QR Code for easy distribution of applicant info into the ARM system when necessary
    c. Use Social Media tagging and hash-tagging upon an applicant joining fresh out of MEPS.
    d. Encourage future sailors with bringing guests and future prospects to all DEP related events. Encourage future sailors to provide an attainable amount of RD's on a weekly basis. For all 11s future sailors, ensure that they provide you at a minimum, all of their teachers contact information and provide them yours as well.
2. Applicant Referral Prospecting
    During the interview you should always attempt to gain contact info for multiple RA's from the applicant being interviewed. These are also known as "Character References" in the same age bracket with shared interests.
3. COI Referral Prospecting
    a. When establishing contact with a potential COI, always set a timetable when they can expect to hear from you. This can be a simple phone call involving general

discussion or a direct call to merely ask about any new candidates of interest. Establish a genuine relationship.

b. Find common interests and mutual acquaintances to Develop rapport with COI's just as you would an applicant/Future Sailor
c. Establish/utilize social media to show the success of their relationship with photos of new Future Sailors. Reward them whenever possible and look for ways you can legally assist their organization or business whenever feasible (public speaking opportunities, community service-related events, etc.).

Personally Developed Contacts (PDCs)

Social Media Live sessions

1. Verify electronic equipment prior to start
2. Utilizing your professional social media page, post and invite to members that you will be conducting a virtual question and answer session on Navy opportunities and benefits.
3. Utilize the BOOST funds mentioned earlier to ensure maximum results in reaching your targeted audiences. Encourage your COI's and Future Sailors to make the same announcements on their pages or have them share your post and tag people to generate awareness.

Social Network Prospecting

Build a strong Social Media presence

1. Create Navy awareness by establishing and utilizing your professional social media page
2. The only material authorized to be shared via your Navy social media page should be professional in nature and only revolve around Navy centric items. Do not post any partisan political propaganda, personal photos, etc.
3. Encourage COI's and other professional business to like/share your social media. This will help in your messaging and creating awareness in your community.
4. Utilize current social media trends (Hashtags, Geofencing)
5. Encourage COI's and future sailors to post, re-post, and tag their friends and people of interests in posts regarding Navy Recruiting.
6. Contact the NRD MAO/NTAG E-Talent director and request a BOOST to your social media prospecting page.
7. Identify hot zip codes with proven high propensities to enlist in the DOD for BOOSTing and ensure you are targeting area of importance in regards to current NRD/NTAG goals.
8. Document return on investment via appointments/new contracts.

Strategic partnerships and Centers of Influence (COIs)

1. Each contact is a potential COI
   a. Understand the difference between an acquaintance and a true COI. A person is not a true COI until they produce qualified referrals to join the Navy.
   b. Inform the COI of the strategic importance of your relationship.
   c. Command level recognition to the COI is a simple deed but goes a long way in establishing and preserving the COI relationship. The goal is to make everyone you encounter a possible COI and pro-Navy.
2. Coordinate Navy work experiences for Centers of Influence (COIs) (e.g., Educator Orientation Visits (EOVs)
   a. An EOV is a great way to establish a relationship and gain access to a "no access" school. Contact the EDSPEC and see what the upcoming schedule is for pending EOV opportunities. This is your chance to invite educators on a field trip allowing them a chance to experience firsthand how the navy operates. They will tour Navy vessels, go on tiger cruises (when available), and speak with various senior members of Navy leadership. They will have an opportunity to meet and visit Special warfare facilities. ALL EXPENSES PAID!!!
   b. This is based upon availability and authorization.
   c. Contact the command EDSPEC and take full advantage of these unique opportunities to showcase the Navy. Your educators will leave pro-Navy and ready to assist you in finding qualified students at their schools.
   d. Benefits of an EOV will range from newly developed COI's, access to the school, improved reputation of the Navy, and more opportunities for you to do classroom presentations. Most importantly, this evolution should provide you a solid foundation for establishing and maintaining lasting relationships with members of the school staff.

Obtain High School and College Lists

1. Who, When and Where do you request the lists?
   a. Request Junior and Senior Lists from the School's registrar or Board of Education as applicable. This request should me made every year when the previous year's juniors become seniors.
   b. Utilize assistance from the command Education Specialist if a school refuses to provide you with a list. Any institution receiving federal funding is required to provide you with a list upon completion of opt-outs.
2. Top 10% list

a. This list is primarily used to identify candidates for the NJROTC program but also proves to be a quality source when prospecting Tier 1-2 applicants for Nuclear, Special Warfare, and other priority programs.
b. A good source for locating NROTC applicants and on the spot Scholarship candidates.

3. Penetrating Market
   Utilize RD prospecting from current future sailors, school lists for phone and social media prospecting. Obtaining the school list on time is an essential key to success for this topic!

Manage Recruiting Aid Devices (RADs) Inventory

1. FLATS
   a. RAD inventory should be maintained at maximum levels in the NRS, and are available to be replenished quarterly via the IPOL ordering system located on the recruiting quarterdeck. The NRS LPO will have ordering access for this function.
   b. Virtual Resources can be found at the following: https://sites.google.com/view/recruitingetoolbox/home
   c. RAD items allow you the opportunity to promote Navy awareness, educational literature, fulfillment, transitional, and sales closing items.
2. RADS via Social Media
   a. Present RADs in video form via BOOST
   b. Create a RAD tracker in order to keep track on where your items are located for follow up.

Presentations

1. VALOR
   a. When giving a presentation, it is a best practice to break the ice and establish rapport with your audience by using FORM from the engage phase of VALOR. Try to establish commonality and develop rapport.
   b. Have the VALOR handbook on-hand for quick reference during virtual interviews until proficiency is obtained.
2. MATTRESS
   a. MATTRESS presentations are perfect tools for short notice presentations. Also known as the “go-to.” The acronym Mattress = Money – Advancement – Travel - Training – Recreation – Education – Security – Success.
   b. If schools are conducting educational requirements virtually this could be an ideal location to utilize this presentation format.

3. Surveys
   Using QR Codes to gather information from interested personnel is an efficient way to access their data in the ARM system upon completion of your presentation.

Enlisted Program Presentations

1. Presentations include active duty, New Accession Training (NAT), prior service, etc.
2. Active Duty
   a. This is your chance to discuss the unique values and benefits of choosing active duty Navy versus the competition.
   b. Utilize visual aids and screen share virtually where your information can be verified on the spot in order to eliminate confusion or doubt and in turn, generate interest in your program.
3. NAT
   a. Provide details on how the program works. Explain how an individual can maintain their day job and still serve their country in a reserve status.
   b. Primary targets for this program are candidates ages 17 – 39. A primary focus is usually placed on individuals who are pursuing college first out of high school and people with established careers who want to feel that pride of belonging.
4. BBETRR
   a. Study and learn Opportunities and Advantages. This is called product knowledge. Understand what you are selling to your customer and understand what the competition can and cannot offer. This will position you to be extremely successful.
   b. Always provide relevant proof for anything the Navy has to offer. Seeing is believing and if they believe you, they will begin to trust you.
   c. Opportunities and Advantages must be researched for updated information.
   d. Build in advance, a binder with each of the phases of BBETRR based upon your experiences and current Navy incentives and benefits
   e. Speak confidently when revealing these opportunities and advantages
5. NSW/NSO
   a. Utilize Special Warfare Coordinator and Scouts for virtual presentations.
   b. Be prepared with Navy approved video's and testimonials.
6. Nuclear Power
   a. Utilize Nuclear Coordinator and Scouts for virtual presentations.
   b. Be prepared with Navy approved video's and testimonials.
   c. NROTC
   d. Utilize Nuclear Coordinator and Scouts for virtual presentations.
   e. Be prepared with Navy approved video's and testimonials.

Enlisted Applicant Interviews

1. Interviews include active duty, New Accession Training (NAT), prior service, etc.
2. VALOR
   a. Establish during the initial appointment which video conferencing application will be utilized and ensure you, as the moderator, are well versed in its functionality and basic operations.
   b. Utilization of the VALOR interview overlay is crucial to conducting the interview. Most video conferencing applications have screen share or capabilities to create an environment where you and the applicant can build the overlay together based on their current circumstances.

Blueprint Applicants

Approved Blueprint sheet

1. Time is the one part of recruiting you never get back, so ensure you conduct a detailed and exhaustive blueprint to ensure applicant is qualified to receive the opportunities you will be discussing.
2. Be clear with questions
3. Ask personal questions in different ways and don't be afraid of "yes."
4. Have the CNRC Recruiting Manual Volume III on your desktop for quick reference.

Set Applicant Appointments

1. Handling Apathy
   a. Discuss the use and purpose of the Apathy Statement.
   b. Discus how to utilize FORM in order to uncover a potential pressure.
   c. Discuss how to address a pressure once uncovered while utilizing FORM.
2. Setting the appointment
   a. Discuss where the interview will occur and what should be done if the applicant expresses issues with transportation.
   b. Discuss when to confirm the appointment and why it is important to do so.
3. Logging Appointments in Salesforce
   a. Discuss how and where to log appointments.
   b. Discuss ways to effectively confirm the appointment.

Administer Screening Tests

1. Tests include Prescreen Internet Based Computerized Adaptive Testing (PiCAT)
2. APT Access

   a. Identify your Command's point of contact for APT access
   b. Logging into APT
3. Sending Test to applicant
   a. Steps to assigning test
   b. Guidelines/timelines for the test
4. Viewing APT Scores
   a. Accessing test scores
   b. How do test scores relate to ASVAB

NSW and NSO Candidate Screening

1. Naval Special Warfare (NSW) and Naval Special Operations (NSO) qualifications
   a. Warrior Challenge Program applicants must meet all basic enlistment eligibility requirements (volume II) and the following:
      - Additional qualifications identified in the 1130.8K, Vol. IV section 3.
      - PST test/qualifications (Applicants must meet the minimum)
      - PST standards established in 1130.8K, Volume V. (See chart on page 561)
2. PST
   a. Component of PST - (See chart on page 561 of the 1130.8K, Volume 5)
   b. Competitive standards- Candidates must strive to exceed the minimum required standards in each test category in order to be considered for selection into the program.
   c. How the draft works – Draft submissions are submitted twice a month; usually the 1st and 3rd Thursdays of each month.
   d. Ensure authorization is authorized and conforms to social distancing protocols when applicable
3. CSORT
   a. Know who at your command is authorized to administer
   b. Ensure authorization is authorized and conforms to social distancing protocols when applicable.

Maintain Applicant Logs (Qualified and Unqualified)

1. Salesforce Dashboards
   a. Dashboard data should reflect all activity acquired by the talent scout when properly entered into the system and appointment/interview outcome feedback is submitted. (appointments/interviews/qualified interviews)
   b. All talent scouts will enter required applicant data into Salesforce (ARM) in order to generate an applicant log. Talent scouts should utilize the filter feature

in “list view” controls in order to label the list and identify who is considered to be qualified versus who is not.

2. Inspection Criteria of Applicant Logs
   a. Applicant log data should be updated to reflect the most current up-to-date status of each individual on the log indicating specific next steps.
   b. Maintain “current + 12 Months” for inspection and prospecting follow purposes.
3. How to use Applicant Logs to increase production
   a. DPR – discuss in detail the status of each applicant and what the next steps are.
   b. Following Up with new and old applicants as required.

<u>Follow-up Screenings on all No-Show Appointments</u>

1. Salesforce Reminders
   a. Utilize the “Upcoming Tasks” function in the Salesforce calendar to produce weekly follow up reminders for QNE applicants for a period of at least 4 months or until contracted
   b. Text, Email, FB message, and phone calls should be conducted on all potentially qualified, no-show appointments in order to obtain a final disposition.
   c. Utilize the Salesforce Calendar to schedule these evolutions.
2. Best Practices to avoid no-shows
   a. Confirm Appointments 24 hours in advance.
   b. Do not oversell the Navy when setting appointments on telephone or social media prospecting. Sell the appointment, not the Navy at this point of the process.
3. LPO execs
   a. NRS LCPO/LPO will conduct follow up executive screenings virtually on all qualified interviews upon completion of the initial interview by the Talent Scout/Recruiter.

<u>Follow-up with Qualified Not Enlisted (QNE) Applicants</u>

1. Salesforce Reminders
   a. Utilize the “Upcoming Tasks” function in the Salesforce calendar to produce weekly follow up reminders for QNE applicants for a period of at least 4 months or until contracted.
   b. Review previous remarks prior to contacting each applicant, and take a different approach when necessary.
2. Importance of Interview Overlay

a. Take good notes. This will help you remember what was previously discussed and will allow you to generate a more effective approach during the follow up call.
b. Focus on the initial pressures and plans, discuss any new pressures and plans and utilize VALOR to present a new plan incorporating new Navy opportunities and benefits.

3. Handle QNE new objections
   a. Prepare in advance for possible new objections
   b. Verify current information prior to utilizing to overcome objections
   c. Utilize the 4 R's when handling applicant objections.

Report Daily Production Information (e.g., acquisition data)

1. Salesforce Dashboards
   a. Ensure all prospecting activity is accounted for by submitting appointment/interview outcome feedback.
   b. Ensure activity is on pace to meet gates and all mission objectives.
   c. Address any production short falls and required adjustments during DPR to ensure a proper plan is in place to attain mission.
2. Planner
   a. Utilize Salesforce (ARM) planners only.
   b. On the last workday of each week, update your plan for the upcoming week.
   c. Document all pre planned activity for the "current week + 4," and beyond if necessary.
   d. Make all necessary adjustments to your plan to increase/attain activity and mission.
   e. Review your planner with NRS LPO during DPR and ensure the documented plan is approved.
3. Training
   a. Self-analyze and identify your own strengths and weaknesses
      - Seek training for areas where you can improve.
      - Ensure a follow up is scheduled with NRS LPO.
   b. Utilize DPR to seek additional training as needed
   c. Set aside time to receive PQS training daily/weekly/monthly as needed.
   d. Conduct/attend Division Training

Transition Applicants to Assessing (when applicable)

1. VALOR

a. Review Interview Overlay with applicant, recap accepted plan to overcome pressures and explain the entire enlistment process.
b. Review Interview Overlay with Assessor, recap mutually accepted plan to overcome the applicant's pressures and discuss possible concerns.
c. Conduct 3-way FaceTime/group call to introduce to Assessor.

2. Following Up
   a. Follow up within 24 hours to ensure the process is moving forward and further discuss/address any concerns that arise.
   b. Follow up with Assessor to ensure process is moving forward and help address any applicant concerns if necessary.

Teleworking Best Practices

1. Stick to a Normal Routine: When you begin the telework process, it is sometimes difficult to get into a groove. Returning to a normal routine is vital to successful teleworking. Successful Teleworkers model their routine as closely as possible to a normal workday. For Example:
   a. Reveille: 0600, drink coffee, eat breakfast, take shower, shave, or workout. Get started earlier.
   b. Pretend you are going into work (Put on your Uniform).
   c. Choose a dedicated workspace.
   d. Be clear with family members regarding your work schedule.
   e. Working Hours: 0830-1830.
   f. Kick the day off with quarters at 0830.
   g. Take breaks often: workout, have lunch with the family, get off the computer, etc.
   h. Schedule reoccurring Daily Production Reviews (DPR).
   i. End the day on a conference call.
2. Develop a Plan: Plans are instrumental while teleworking. It is important that each team member is on the same page and has a blueprint of how the day will be executed.
   a. Develop a prospecting plan. Be specific and detail what each member should accomplish each hour.
   b. Provide tangible goals in each prospecting evolution. # of attempts, # of contacts, and # of posts.
   c. Review success during DPR's. Adjust the plan for the rest of the day.
   d. Make time for individual mentoring, training, mid-term counseling, and to see how everyone is doing.
   e. At the end-of-day conference call, talk about what worked and what didn't, and solicit ideas to move forward and become for effective and efficient.

f. Work together to come up with a prospecting plan that works.
g. Adjust the plan for the next day or the rest of the week. Track successes and failures. Add more of what works to the plan.
h. Continue to try new things and adjust plans.
i. Hold each other accountable. When you get off the plan, work quickly to get back on track, document missed activity, and reschedule missed activities to another time.

3. Use “Tried and True” Recruiting Practices: Just because we are working from home, it doesn’t mean that we should abandon tried and true recruiting practices. This is the perfect time to start working on your craft and implementing the practices, that we should be doing daily.
   a. Re-engage applicant log declines over the last 12 months.
   b. Re-engage No-Shows over the last 12 months.
   c. Use all prospecting modes available to increase your footprint:
   d. LEADS (RN/RL).
   e. Online Applications (OA).
   f. Phones (PH): 11S, 12L phone prospecting using ASVAB lists.
   g. Social Networking (SN): Facebook, Instagram, Snapchat, Twitter, LinkedIn, Email, and Text.
   h. Referral Prospecting (RD/RA/RS/RI etc.).
   i. Use Future Sailors to get you in contact with our target market.
   j. Use the CRM (Salesforce) to develop working lists, targeting High Quality Markets.
   k. Add school surveys not previously entered into salesforce and prospect.
   l. FOLLOW UP, FOLLOW UP, FOLLOW UP!
4. Work and Create LEADS and Online Applications: As Recruiting Command and the National Advertising Campaign moves toward all digital advertising and prospecting, we should see an increase in Online Applications and LEADS across the enterprise. It is imperative that we leverage all of them to our fullest capability.
   a. LPO attempt within 24 hours.
   b. Contact within 72 hours.
   c. Disposition within 5 days.
   d. Call, Text, Email, use Social Networking.
   e. Ask the MAO/E-Talent Director for the LEADS not sent to the field list. LAST 12 Months!!!
   f. Go back and contact all LEADS that could not be contacted or had incomplete records.
   g. Use the Recruiter E-Toolbox to create QR codes driving them to Navy.com.
      - https://sites.google.com/view/recruitingetoolbox/social-media

h. Use the shareable RADS on the cnrc.navy.mil page. All QR codes drive them to Navy.com.
    - https://www.cnrc.navy.mil/creative/rads.htm
i. Use these resources to share on your Social Media pages to ensure LEADS generation at Navy.com.
j. FOLLOW UP, FOLLOW UP, FOLLOW UP!

5. Develop New and Creative Social Media Prospecting Techniques:
    a. Use the Recruiter E-Toolbox to create pages on all Social Media sites.
        - https://sites.google.com/view/recruitingetoolbox/social-media
        - Read and implement all Social Media guides.
    b. Get creative but stay professional.
    c. Reach out to other Recruiters who are successful using Social Media.
    d. Set up Digital Business Cards.
    e. Share pre-made content from the National Advertising Campaign.
        - Rating Videos, Faces of the Fleet, Sailor vs., and Sea Stories.
        - https://sites.google.com/view/recruitingetoolbox/media-creative
    f. Reach out to the MAO/E-Talent Director for Command Best Practices.
        - Command Facebook, Instagram, Facebook, and Snap Chat pages.
        - Officer Recruiters using LinkedIn.
        - Share best practices and successes with other recruiters; both local and nationally.
    g. Implement best practices and successful campaigns command wide.
6. Interact and Communicate with Other Humans: You are used to having constant physical, face-to-face contact when you are in the office. Don't stop communicating just because we are teleworking. You are working at home, not on the moon.
    a. Use available technology to talk to your team.
        - FaceTime
        - Skype
        - Facebook Messenger
        - Google Hangouts
        - Call often to check on your team.
        - Don't just talk about work.
        - Set up a quick message tool.
        - WhatsApp
        - Group Me
        - Group Text
    b. Use Defense Collaboration Service to get your team together.
        - https://disa.mil/Enterprise-Services/Applications/Defense-Collaboration-Services

c. We are working on collaboration with other electronic meeting services.
d. On breaks, interact with your significant other or children.
e. Be consistent and remain a team.

7. Have Lofty Goals but Be Realistic: Remember what it's like to be at work. There isn't a day without breaks or time left to relax. Projects always take longer than we initially think and we very seldom complete everything we plan.
   a. Overestimate how much time you'll spend doing one thing.
   b. Overestimate how many things you will do during the day.
   c. Understand that you may not complete every task you set out to do.
   d. You may come up short, but you'll still have a solid list of tasks filed under "complete."
8. Stay Busy:
   a. If you want something done, ask a busy person.
   b. The busier you are, the more you'll actually do.
   c. Newtons law: if you're in motion, you'll stay in motion…If you're at rest, you'll stay at rest.
   d. Staying busy gives you the momentum to complete any task that comes across the desk.
   e. Staying busy will help you manage your time efficiently.
9. Find What Keeps You from Being Distracted: Some will experience more distractions while working from home. Whether it's the kids running around or your partner asking questions, find a way to stay on task.
   a. Buy some soundproof headphones
   b. Match your music to the task at hand (I prefer upbeat playlists with songs I know).
      - Try new genres
      - Try video game soundtracks
      - Change the Station
      - 70's/80's/90's and 2000's (which one motivates you more)
   c. Use the laundry as a work timer.
      - Use the laundry as a built-in timer
      - Use the time to start and finish something on the to-do list
      - Commit 1 task during the wash cycle and 1 during the dry cycle
   d. Keep the TV on in the background.
      - What station works best to motivate you
      - Try something you aren't interested in
10. Have Fun: I think most of us prefer to be at work because we have fun. Interaction with others create interesting conversations. Running with someone always makes

it easier to finish. Remember that you are not alone. Prospecting with someone makes it easier to approach our market. Don't go it alone.

a. Work with another Team Member.
b. Compete to see who has the best results.
c. Take time to talk about other things besides work.
d. Involve you spouse and children (they may have an idea you haven't thought of).
e. At the end of the day, wrap it up, don't keep work at home.

Best Practices on Social Media

1. Facebook – there is a LOT of noise on this platform. You are competing with family, friends, sports teams, candy crush invites…etc. Therefore, it is important to create MEANINGFUL content. FB's algorithms focus is on quality over quantity content, and will allow your post to appear more often with interactions. When posting ask for feedback, for example, "Here are places I have traveled, if you could travel anywhere for free where would you go?" - or - "What would you do if you had to make a decision to XYZ or ABC?" Strive for meaningful connections. Asking a question or sharing an opinion can spark a discussion and expose you to hundreds of potential candidates, but make sure to do more than just post your jobs.
    a. What Percentage of Companies Use Facebook for Recruitment? 66%
    b. Why You Should Use Facebook for Recruiting: Facebook may not be a dedicated professional network like LinkedIn, but its sheer size makes it an indispensable resource for recruiters. Its casual atmosphere can shed some light on an individual's personality away from work, and it even offers a job board.
    c. How to Connect with Candidates on Facebook: The options are just about endless here. Follow and interact with prospective candidates; Join (or create) relevant groups; Create and share content to promote the Navy; Promote recruiting and networking events; Start chats on Messenger; and, of course, post openings on the Facebook job board.
    d. Best Days to Post on Facebook: Thursday, Friday, Saturday, and Sunday.
    e. Best Times to Post on Facebook: 9 AM, 1 PM, and 3 PM.
2. LinkedIn – What Percentage of Companies Use LinkedIn for Recruitment: 96%. The mission of this platform is to connect the world's professionals, to make them productive, and successful. The great thing about LinkedIn is that it has become more personal. You can share ideas, tips, content, or best practices – you can share the same article or content from FB, but tailor it to show how it could make someone successful.
    a. Why You Should Use LinkedIn for Recruiting: With more than 11 million active job postings, LinkedIn is a go-to for most recruiters, but a refresher never hurts.

As the original professional social network, LinkedIn offers an unparalleled overview of a candidate's work history. It also provides insight into their interests, endorsements and referrals.

b. How to Connect with Candidates on LinkedIn: LinkedIn allows you to do much more than post a job. Start by connecting with and following prospects. Start conversations with personalized messages introducing yourself and your company. Comment, like, and share industry content to gain attention and authority. Follow, endorse, and write recommendations for talented individuals to build rapport. Ask for referrals and introductions, and reciprocate the favor.
c. Best Days to Post on LinkedIn: Tuesday, Wednesday and Thursday.
d. Best Times to Post on LinkedIn: 7-8 AM, 12 PM, 5-6 PM

3. Twitter – What Percentage of Companies Use Twitter for Recruitment: 53%. It highlights what is happening in the world, and what people are talking about right now -- it is a micro blog. The platform wants to know and highlights what people are doing , thinking, and/or experiencing. It really is just one big text message. Listen to what others are saying and respond – this is a great way to use this to target your audience. Allowing you to get in front of your target market.
   a. Why You Should Use Twitter for Recruiting: With its 280-character limit, Twitter is known for being short and sweet. Communications brevity is not a bad thing; Twitter has become a go-to source for news and events. Everyone from celebrities to major companies use Twitter to engage with people worldwide.
   b. How to Connect with Candidates on Twitter: Twitter gave birth to the hashtag, so start there. Search for relevant hashtags to join conversations and attract likeminded candidates. Like, comment, follow, tweet, and retweet to engage with candidates. Retweet and share timely information by live-tweeting and live-streaming. Pin relevant tweets to keep them visible on your profile.
   c. Best Day to Post on Twitter: Wednesday.
   d. Best Times to Post on Twitter: 12 PM, 3 PM, 5-6 PM
4. Instagram (IG) - What Percentage of Companies Use Instagram for Recruitment: 7%. It is an image-based app for smartphones that allows users to enhance photos they've taken (using really cool filters that make anyone look like a pro behind the lens) and share them with their followers. Much like Twitter and Facebook, users can connect and follow accounts they like, comment on images they find appealing, 'like' images they're drawn to, and share those images with their friends. Look for your market and add/request friends.
   a. Why You Should Use Instagram for Recruiting: Instagram's visual format has become hugely popular with millennials (the largest portion of the workforce) and Generation Z. Despite its popularity, less than 10% of recruiters leverage this channel, which represents a huge early mover opportunity.

b. How to Connect with Candidates on Instagram: Curate a variety of visual content that captivates your audience's attention and encourages them to follow the company page. Engage with people of interest by following, liking, and commenting on their content. Participate in trending topics by posting related content with appropriate hashtags. Host Q&A sessions with the Stories feature either live or with their infinite library of stickers.
c. Best Days to Post on Instagram: Monday and Thursday.
d. Best Times to Post on Instagram: 8-9 AM, 5 PM

5. Youtube What Percentage of Companies Use Youtube for Recruitment: 11%
   a. Why You Should Use Youtube for Recruiting: If you're one of those "back in my day" types you may want to look away…when given the option between text and video, 72% of internet users choose video. Furthermore, when it comes to video, Youtube is the undisputed heavyweight champion. Like Instagram, few recruiters have embraced the channel, so those who get in now will have the advantage.
   b. How to Connect with Candidates on Youtube: This one is a little more straightforward. Create great video content tailored to your prospective candidates. Don't forget to repurpose videos from the Navy's websites and other social media channels.
   c. Best Days to Post on Youtube: Thursday and Friday.
   d. Best Times to Post on Youtube: 9-11 AM, 12-4 PM

Tips on How to Use Your Professional Platforms:

a. When it comes to content, think before you post. You do not have to necessarily be creative, but ensure you are authentic, personal, and approachable.
b. Photos & Video: if it is a photo it should be pulled from the Recruiter E-Toolbox where you can easily find official photos highlighting life as a Sailor, opportunities, history & heritage, Face of the Fleet, Sailor VS, and CNRC America's Navy YouTube videos.
c. Create a "Q&A LIVE." Topics may include:
   About the Navy, Rate(s), Boot Camp, Bonuses, Uniforms, Traveling, Debunked Myths, or Naval History. When it comes to the digital world, video is now king opening up a world of possibilities for social media recruiting. Livestream an event in your office or an event at which you're presenting. Host Q&A sessions for viewers to learn more about the Navy and ask questions that you or your team can respond to in real-time. Share a behind the perspective of life as a Sailor. Conduct live job interviews!
d. Share:

Your story, experiences, Navy Opportunities, Events, Deployments, or Life as a Sailor, how to make an individual successful.

e. Provide Advice:
   What makes a successful Sailor or provide mentorship, life experiences, or travel opportunities.
f. Engage:
   Respond to comments, answer questions, or engage in dialogue on a feed (do not be argumentative, talk about politics, or religion). Like and comment on content from pages you follow, such as schools, local community groups that will target your market. Engagement is key to creating a large following and generating leads. Give shout-outs on your platform. Don't be afraid to respond directly to content they've posted (just don't be creepy or generic) and encourage them to direct message you to continue the conversation.
g. Send DM:
   Regardless of your platform of choice, you'll be able to send candidates one-to-one messages. This is an excellent way to start the conversation, but don't lead with a hard sell. Create a personalized message expressing your interest in the candidate, and be sure to include specific information about the individual so they know you are serious and aren't spamming.
h. Post Every day! Post regularly!
i. Track and observe what works. Track analytics on insight. After attaining 5,000 friends on your FB, you can still have an unlimited number of followers.
j. TAKE FULL ADVANTAGE OF HASHTAGS.
   Hashtags are one of the best ways to connect with specific audiences by searching for your market and posting specific tags to be discovered. After incorporating hashtags, it will be extremely efficient to monitor the relevancy and quantity of people following it. Hashtag examples: #USNavy #Navy #NavyRecruiter #Sailor #Career #Classof2020 #AmericasNavy #ForgedbytheSea #Hiring #JobSearch #Hiring …etc

<u>**Social Media Checklist**</u>

1. Daily
   a. Reply to incoming messages ASAP
   b. Check alerts for brand mentions and respond as needed (hashtags, tags, or searches)
   c. Monitor for untagged mentions and related keywords and respond as needed
   d. Check current trending topics for language to include and avoid
   e. Schedule posts according to effective times of day:

- 5-10 times for Twitter
- 1-2 times for Facebook
- 1-2 times on Snapchat
- 1-3 times for Instagram
- Update Instagram Story
- 1-time LinkedIn

f. Review products and services for upcoming posts (America's Navy, U.S Navy, and CNRC FB)
g. Work on original content: blogs, videos, encouraging podcasts, etc.
h. Monitor competitor platforms for ideas, responses, and trends (other military branches)
i. Engage with active followers and fans (Respond, comment, or DM)

2. Weekly
   a. Connect with influencers in the space (other Recruiters, COI, Community, and Schools)
   b. Check analytics and adjust scheduling and topics as needed (Insights)
   c. Create and monitor weekly goals for engagement, consistency, and growth
   d. Strategize with colleagues
   e. Check analytics for paid ads and adjust as needed (FB Boost and IG to flow to FB Page)
3. Monthly
   a. Check analytics for all platforms and make required adjustments to scheduling, topics
   b. Research and try a new strategy each month; flag for follow-up analytics
   c. Set goals and reminders for the next month
4. Quarterly
   a. Review analytics quarterly and consider needed adjustment to scheduling topics
   b. Consider strategy changes for paid and organic audiences
   c. Review new strategies—integrate winning attempts and discard those that didn't get results
5. Annually
   a. Review analytics annually and consider needed adjustment to scheduling topics
   b. Consider strategy changes for paid and organic audiences
   c. Consider brand messaging and adjust as needed
   d. Research platform development, growth, losses

II. Salesforce/Arm User Guide

Salesforce/ARM Log-in Procedure

1. Logging in:
   a. Enter the ARM Salesforce URL: https://navy-recruiting-command.my.salesforce.com into the Chrome browser and press Enter. You will be taken to the Salesforce ARM login page. Select CAC Login
   b. Click Sign in with CAC/PIV Card.
   c. Enter your PIV card and select the user certificate.
   d. From the Select a Certificate window, click More Choices.
   e. Select the DOD ID CA-51 certificate and click OK.
   f. Enter your PIN and click OK.
   g. The DOD IS window will appear, click the I Accept radio button, then click Finish.
   h. You will land on the ARM Home Page
2. Opening the ARM Application
   a. Open a web browser (Google Chrome or Mozilla Firefox) and enter the following URL into the browser and click Enter: https://navyrecruitingcommand.lightning.force.com/one/one.app#/home
   b. Click the App Launcher icon in the top left corner of the screen (nine dots).
   c. Click on the Precision Recruiting Solution icon

Navigating Navy Applicant Relationship Management (ARM)

1. The ARM Module acts as your assistant, allowing you to spend more time processing and interacting with Applicants. Discover high quality Applicants using the ARM star rating system and search functions. Blueprint and track your Applicants in one location. Collaborate on your Applicants with the ARM Community. Create helpful reminders, calendar events, and constant communication with Applicants. Process dynamic reports based on real-time data in the application.
2. Quick Buttons -The static header in ARM contains several useful tools for you to use throughout the day.
   a. Search bar-Allows the user to enter key words andfind corresponding records. The Search Bar is available at the top of each page.
      - Click in the field of the search bar.
      - Begin typing. As the field is filled in, suggestions will begin to appear below based on the search.
      - Advanced Search
      - To perform a more specific search, select the “All” drop-down.

- Select from the categories listed below. User may need to scroll down to find the specific topic they wish to search.

b. Global Actions-This button allows the user to quickly create new appointments, emails, notes, reminders, and log a call to Applicants.
c. Notifications-This icon will show how many notifications the user has. Prior to clicking the icon, there will be a number badge signifying there is a new notification. Click on the bell to view the notifications. They will be displayed in a drop-down.
d. User Settings-Click the User Settings button to view your Settings or to log out of the ARM Application. In Settings, you can edit your information such as contact information and password or view last login.
e. Help-The Help will be available to the user for each page in ARM. The user can click the question mark button in the top right of their screen and the Help content will display in a drop-down where the user can scroll and find the topic they need assistance with.

3. Tabs-The tabs across the top of the application aid in swift and simple usage of the ARM application
   a. Home Tab-The Home tab is also the ARM landing page. Here, users can quickly view their Tasks, Events for the day, and recently viewed records.
   b. Applicants Tab-The Applicants tab allows the user to view recent Applicants that have been entered into ARM and create new Applicants records.
   c. Dashboards-The Dashboard tab gives the user a snapshot view of trends and metrics within the ARM application. Each component/chart in a dashboard is based off a report. Users can have multiple dashboards.
   d. Reports Tabs-Use Reports to view specific sets of data in ARM. Here users can Run, Edit, Subscribe, export reports, and Delete reports. Users can also create new reports, sort reports, and view recent. Certain reports can also be made a favorite; doing so will make them appear in the Reports drop-down.
   e. Calendar Tab-The Calendar tab allows users to add events and meetings with Applicants. Users can also share their calendar.
      - Calendar Sharing
      - Click on the drop-down arrow under My Calendars in the bottom right of the screen
      - Select Share Calendar to allow other users to view your Calendar
      - Search for the users that will be allowed to view the calendar. When finished, click Done.
      - Adding Calendars
      - Click the Other Calendars button and click Add Calendars

- Search for the People whose calendars are to be added. When finished, click Add.
- Adding a new event
- Click New Event at the top right of the screen
- Select a record type, Meeting or Appointment. Click Next
- If Meeting was selected, fill out the Meeting Event. When finished, click Save. The new meeting will appear on the calendar.
- If Appointment was selected, fill out the Appointment Event. When finished, click Save. The new appointment will appear on the calendar.

f. Chatter-Chatter allows users to manage their own groups and streams. Users can follow others, join groups, bookmark feeds, and view highlights from the past week.

Managing Applicants

1. Notes on Applicant routing and Ownership - Individuals can enter their information on a web form, which will create an Applicant in ARM once the web form is submitted. Use this feature in instances such as career fairs or trade shows.
    a. Open any web browser and enter URL: http://prsnavy.force.com/contactform
    b. Enter the required fields and any additional information
    c. Click Submit and an Applicant will be created in ARM for recruiters to begin blueprinting.
2. Viewing and Finding Applicants
    a. Find Applicants with the search bar
    To search for existing Applicants, enter the Name, email, or phone number of the candidate you are searching for in the Search Bar at the top of the screen.
    b. Find Applicants using list views
        - To query existing Applicants, click the Applicants tab at the top of the page.
        - Your Recently Viewed Applicants will be presented. To change the List View, click the arrow to the right of the List View name.
        - Create a customized query by clicking on the gear icon and clicking New.
        - Give the List View a Name and select the list visibility. When finished, click Save. The API Name will auto complete with the List Name.
        - Use the Gear icon to select the fields you would like to display.
        - Use the Filter icon to specify the criteria of your query.
        - Click on an Applicant Name to view the record.
3. Taking Ownership of Applicants
    a. Assigning a TAOC to Applicants
        - Select the name of an Applicant from the Applicants tab. The record opens.

- Select the pencil icon next to the New TAOC field on the Details Tab of the Applicant Record.
- Update the New TAOC field by selecting an available option from the drop-down. The new Station ID field is now available to update.
- Update the New Station ID field by selecting an available option from the drop-down.
- Select Save. The Applicant Account is now transferred to the assigned TAOC. The Applicant Record will now display in the assigned TAOC list view and can from there be changed from unassigned to Assigned to a Specific Recruiter.

b. Changing Applicant Ownership - ICON
   - Open an Applicant List View (this does not apply to Sales, Waiting, or Recently Viewed list views). Select the name of an Applicant. The record opens.
   - Under the Details tab of the Applicant record, select the Change Owner icon next to the Applicant Owner Field.
   - Type the name of the new owner into the Search People field and select the new owner. Their name will appear in the field.
   - Select from the options below the New Applicant Owner, of what will be transferred from the old Applicant Owner.
   - Select the send notification email to ensure the new recruiter is notified of the newly assigned record
   - Click Change Owner. The Applicant Owner has now been changed, a green banner will display notifying of the successful change, and the Recruiter initiating the change will no longer be able to edit the Record.
   - The RSID values with the new recruiter's station will be updated and the transfer of the applicant to a new owner initiated
   - The newly identified applicant owner must access the record and make an edit before the territory will update

c. Changing Applicant Ownership – List View
   - Open an Applicant List View (this does not apply to Sales, Waiting, or Recently Viewed list views). Select the name of an Applicant. The record opens.
   - Under the Applicant Owner Alias column, click the button next to the Applicant Owner Alias name, a drop-down will appear. Click Change Owner.
   - Type the name of the new owner in the Search People field and select the new owner. The name will appear in the field.
   - Select from the options below the new Applicant Owner, of what will be transferred from the former Applicant Owner.

- Select the send notification email box to ensure the new owner is notified of the newly assigned record
- Click Submit. A green banner confirming the change will be displayed and the Recruiter initiating the change will no longer be able to edit the record.
- The RSID values with the new recruiter's station will be updated and the transfer of the applicant to a new owner initiated
- The newly identified applicant owner must access the record and make an edit before the territory will update

4. Creating an Applicant
   a. New Applicant Form
      - Click on the Applicants tab
      - Click the New button
      - From the New Applicant window, click the Candidate radio button, and then click Next
      - Complete the New Applicant: Candidate form. All required fields will be marked with an information required icon
      - When the form is complete, click Save

   b. Saving Options
      - Save – Saves the applicant form and the new applicant record will appear under the Applicants tab.
      - Save & New - Saves the applicant form and the new applicant record will appear under the Applicants tab. A new applicant form will appear
      - Cancel – Closes the applicant form window and brings the user back to the Applicants tab view.

5. Blueprinting an Applicant - The Details section of the Applicant is used to collect the initial blueprinting of an Applicant.
   a. Open an Applicant record and click the Edit button in the top right corner of the record.
   b. The record will open. Fill out all required fields marked with a red asterisk: Last Name, Applicant Status, Applicant Source, Served in the Military Before? Date of Birth, and Gender. Otherwise, you will receive an error.
      - Applicants require either a First Name or the No First Name box must be checked.
      - A phone number must be entered in the correct format.
      - If a number is provided in the secondary Phone Number, the Phone Type will be required.
      - The Social Security Number must be entered in the correct format
      - If you are presented with an error, correct the respective field and click Save.

   c. To add a Note or Attachment to an Applicant:

- Click the Supplementary Info tab on the applicants record
- Under the Notes & Attachments section, click Upload Files
- Select the Notes or Attachments to upload. When the upload is complete, click Done. The Notes & Attachments section will display the new upload

6. Changing an Applicant Status
   a. Click on the Applicants tab.
   b. Select an Applicant. Their record will open. The Applicants record status appears at the top of the record. The status indicates where the Applicant is in the recruiting process.
   c. To change the status of the Applicant, follow the Guidance for Success tips, located under the Applicant Status bar. You will first need to change the ownership of the record into your name
   d. Log an activity for the Applicant. You can call or email the Applicant.
   e. When an activity has been successfully logged for the Applicant, the status needs to be changed from New to Sales. In the Status field, click the Edit icon. This will be located under the Details tab in the Applicants record.
   f. Select the new status from the Status drop-down.
   g. Click Save. The Applicants status has now been updated and the Guidance for Success tips will show new instructions for furthering the Applicant.
7. Communicating with an Applicant - Use this tab to learn how to send emails, log calls, create tasks, follow ups, and set appointments. Navigate to the Communicate tab on the right side of the Applicant record.
   a. Logging a Call
      - To log a call, click the Log a Call tab under Communicate on an Applicant record, then click Add. Or click in the Recap your call… field. The field will expand.
      - Complete the required fields.
      - Click Save. Prior to saving, all required fields must be completed
   b. Sending an Email
      - To send an Email, click on the Applicants email address
      - An email window will appear with the To and From lines pre-populated
      - Complete the body of the email or to send with an email using a template, select the Insert, Create, or Update template button. This button is located at the bottom left of the email window
      - Select the template of your choice and the email body will be populated. You can still edit the body of the email.
      - Review and/or edit the Subject and body of the email. When finished, click Send.
   c. Creating a Reminder

- Click the Reminder tab. Use this feature to set up reminders or any other tasks that relate to your Applicant.
- Complete all required fields.
- Click Save. Upcoming Reminders will be listed on the ARM Home page.

d. Setting an Appointment - An Appointment is the date and time of a scheduled interview with a candidate. That Appointment will be considered as an interview after the Outcome has been added.
   - To set an Appointment, click the Appointment tab
   - Choose a Label: Appointment or Rescheduled Appointment
   - Select a Subject: Appointment or Rescheduled Appointment
   - Enter a Description in the Description field.
   - When all required fields have been completed, click Save. Upcoming Appointments will appear on the calendar.

e. Holding a Meeting - A meeting is a time set aside for any type of assembly with peers, leadership, or candidates. Events with the Meeting label should be used for any gathering or designated time that would not be considered for Appointment or interview credit.
   - To create a Meeting, click the Calendar tab.
   - Click anywhere within the calendar or on the New Event button.
   - Select Meeting and then the Next button.
   - Complete all required fields for the meeting any other optional fields.
   - When finished, click Save. The new meeting will appear on your calendar.

8. Applicant Activity Timeline and History
   a. Future Tasks or Events
      - Navigate to the Communicate tab on an Applicant record.
      - All future Tasks or Event related to an Applicant are listed under Upcoming & Overdue.
      - To view the Appointment details, click Appointment.

   b. Past Activity - Tasks/Reminders, Events/Appointments, and Emails that occurred in the past are listed under the month breakdown.
      Click on any Task, Event, or Email name to view details on the activity

   c. History - Changes made on the Applicant are recorded in the History tab. Changes listed here include fields updates, ownership changes, and addition of related records to the Applicant.

9. Disposition for National Advertising Leads Tracking System (NALTS) - NALTS Leads are imported to ARM daily. These NALTS Leads will be present on Applicant records in the NALTS tab. Leads must be dispositioned within 30 days of entering ARM from NALTS.
   a. Click the NALTS tab on the Applicant record.

b. Click Edit
c. The Edit Campaign Member window opens. Answer the disposition questions.
d. Click Save. The Disposition Reason and Disposition Date will update each time the Lead is dispositioned.

Blueprinting Applicants

1. In-Depth Blueprinting of an Applicant - Applicant records allow for further blueprinting. The Details tab contains all high-level information pertaining to an Applicant.
   a. Click the Supplemental Info tab for additional blueprinting categories.
   b. Click the New button on any category to add a related record to the Applicant.
   c. Click Save on the prompt and the related record will appear on the category.
   d. Click on the name of the related record to view or edit it.
   e. The Applicant can also edit and save details on these related records in Community
2. Collaborating with an Applicant Using Community - Add related records to the Applicant record by following the steps in Section 4.1. Communicate with your Applicant to guide and encourage them to add information using the Community. Remember to document all communication in Communicate on the Details tab of the Applicant
   a. Add all blueprinting data to the Applicant record.
   b. Review any information that the Applicant adds and encourage them to review any that you have entered as well. The following is what the Applicant sees in the Community:
      - An Applicant can view their record by viewing the MY ACCOUNT tab
      - They can add all relevant attachments in Notes & Attachments in the Community rather than sending them over email
      - An Applicant can click the Edit button on their record or on any related record name to edit their information

Submitting Applicants to PRIDE

1. Project to PRIDE Tab
   a. A list of required fields is provided in the tab. Click the Next and Previous buttons to progress through the fields.
   b. Enter or update Applicant information in each field.
   c. Clicking the Finish button at the end of the wizard will update the Applicant record. If any information is missing, you will be informed with red text.

   d. Once the required information has been entered, the Submit Applicant data to PRIDE button will become available. Click the Submit Applicant data to PRIDE button to send the Applicant data to PRIDE.
2. Manual Entry of PRIDE Information - An Applicant is ready to project to Personalized Recruiting for Immediate and Delayed Enlistment Modernization (PRIDEMod) after all Applicant information, Medical Information, and Projection Data is completed.
   a. Enter Applicant Information in the Details section of an Applicant record. The following are required before projection is available:
      - Mailing Address
      - Marriage status
      - Number of dependents
      - Faith
      - Racial category
      - Ethnic category
      - Citizenship
      - SSN
      - Place of birth country, state, city
      - Selective Service Number
      - High School name
      - Education code
   b. Complete the Police Verification information in the Supplementary Info tab. Entry of a driver's license is optional to project to PRIDE Mod.
      - Click New on the Police Verification section
      - When finished click save
   c. Enter Medical Information in the Supplementary Info tab.
      - Click New on the Medical Information section
      - When finished click save
   d. Enter Projection Data in the Projection Data section of the Applicant record Details, you may need to scroll to the bottom of the screen for this section.
   e. When all required data is entered, the Submit Applicant data to PRIDE button will be available under the Projection Checklist on the Details section of the Applicants file. Click the button to send data to PRIDE.

Communicating with Chatter

1. Chatter is a social network built into ARM that allows you to collaborate with other recruiters across NRC. Ask your fellow Sailors questions, solve issues as a collective unit, collaborate on Applicants, and share knowledge about the recruiting processes

and policies. Follow Applicants or recruiter profiles to stay tuned-in on the latest happenings.

2. Chatter Tab
    a. Create a Group
        - Once on the Chatter tab, + button to the right of Recent Groups
        - In the New Group window, Enter a name. Enter a description to explain the purpose of the Group
        - Scroll down, your name will show in the Owner field. If you wish for the new group to be owned by someone else, remove your name and enter a new name in the field.
        - Choose an Access Type:
        - Public
        - Private
        - Unlisted
        - Click the Save & Next button.
        - Upload a picture for the group.
        - The next screen will let you choose the members of the group.
        - As the creator of the group, you will default as the owner
        - When adding other member or managers, you can decide whether those members and can make changes to the group
        - When finished creating the group, click Done
    b. Managing a Group
        - Post – share updates on what is happening with the Applicant since the last time you spoke. Every person following the record will be updated. Typing "@" and then a specific person's name will send him or her a notification of your mention.
        - Announcement – a post with an expiring date for limited time announcements.
        - Poll – ask a question which the members of the Group can contribute their insights and vote on.
        - New Group Member – when adding other members, you can choose if they are members and can't make changes to the Group or managers who can make changes to the group too.
        - Edit Group – edit the details of the Group.
        - Delete Group – delete the Group.
        - Manage Notifications – select how frequently you'd like a compilation of posts sent to your email.
        - Engagement – analytics for the Group.
    c. Share a Post

        - Click on the Group that you wish to post in.
        - Under the Chatter tab, Click Post.
        - To share updates, enter a message in the body field.
        - Typing an "@" along with a recruiter's name will send him or her a notification of your mention.
        - When finished, click the Share button.
    d. View your Chatter Feed - View and interact with the records you follow in What I Follow in the Chatter tab at the top of ARM. Groups allow you to communicate with a preset collection of users.
        - Click on Recent Groups to open and view List Views of Groups.
        - Once you are on a Group page, you can network with the other members
3. Follow Records - When you follow an Applicant record, you opt into notifications on changes or posts of the record.
    a. On any Applicant record in ARM, click on the + Follow button.
    b. You will now receive updates on the record you have followed in your Chatter feed.

<u>Reports & Dashboards</u>

1. Viewing a Dashboard
    a. Click the Dashboards tab to view a Dashboard.
    b. Click All Dashboards on the left panel.
    c. Click on the Dashboard name to view it.
2. Viewing a Report
    a. Click the Reports tab to view a Report.
    b. Click All Reports on the left panel to navigate through all the Reports you have access to.
    c. Click on the Report name to view it.
    d. Click All Folders on the left panel to view the Report Folders you have access to. Click on the name to view it.
3. Creating and Editing a Report
    a. Creating a Report
        - Once in the Reports tab, click the New Report button.
        - Choose a Report Type and click Continue.
        - Select the Add column field, search for, and select any additional fields needed.
        - Drag and drop the field headers to rearrange them on your report.
        - Edit the Filters to refine your data.
        - Save your report by clicking the Save button at the top right of the report.

b. Editing a Report
   - Click the Edit button to be taken back to the edit screen.
   - Use the Add Chart button to add a chart to your report.
   - Click the Filter button to edit any filters.
   - Click the Refresh button to refresh the data.
   - Click the Edit drop-down arrow for additional options, including exporting your report.

4. Sharing Report Folders - Reports are shared based on the Folder they are in. To create and share a Report, you must first use or create a Folder and share that Folder with the appropriate users or groups of users.
   a. To Create a new folder
      - Create a Folder by clicking the New Folder button.
      - Complete the Folder Label and Folder Unique Name fields.
      - Click Save. To share this folder, follow steps 4-8.

   b. To Share an existing Folder
      - Choose an existing Folder.
      - Click the drop-down button to the right of the Folder.
      - Select Share and a prompt will appear.
      - Enter the users or groups of users that need access. Use the Access field to determine the level of sharing. As the users or groups are added, a list will form below the Who Can Access field. This list can be edited, where Groups or certain users can be removed if need be.
      - Click Share. The Folder has now been shared with the specified users.
      - When finished, click Done.

III. Assessing/Processing Applicants

Validate applicant eligibility

1. Screen applicants IAW CRUITMAN (VOL II) for Mandatory Rejections
   a. Can be completed via phone or FaceTime.
   b. BEERS documents can be shown to Assessor on FaceTime to ensure eligibility and hard copy documents can be picked up and scanned by assessor at a later date.
   c. When collecting documents and signatures this is the ideal time to conduct height and weight measurements. Coordinate with NRD/NTAGs to acquire scales and tapes. Adhere to same sex requirements for measurements.
   d. Waivers are not authorized for these rejections; they are automatic rejections.
   e. Open Civil is a common occurrence.

f. Pay attention to Probations, there is a difference between supervised/unsupervised and conditional/unconditional probations.

2. Age requirements
   a. 17-year-old applicants may not ship prior to turning 18 unless their 18th birthday occurs NLT 60 days after ship date.
   b. Unmarried 17-year-old applicants require a parental/guardian consent by both parents if living prior to the physical examination.
   c. If processing a single parent consent for a 17-year-old applicant, all means must be exhausted in contacting other parent prior to properly completing a NAVCRUIT 1133/97. This process is only for deserted or disappeared parent and all 1133/97s must be notarized and then sent to NRC COMNAVCRUITCOM (OOJ) for screening and approval.
3. Citizenship requirements
   a. Must have proper BEERS documents i.e. birth certificate, passport, I-511, etc. prior to determine citizenship eligibility prior to processing.
   b. DD 372 (BIRTH VER) is for applicants only to DEP and not for applicants' dependents.
   c. Ensure I-511 (green card) is issued on or after 14th birthday and will not expire while member is in DEP.
4. Use the DD FORM 2807-2 for medical.
   a. Send form to applicant via email, PDF, or other means as approved by NRD/NTAG
   b. Applicant and Processor can verbally review each question via phone or FaceTime so that Assessor may electronically record all responses and information on the DD FROM 2807.
   c. At a later date, Assessor can have applicant physically initial and sign completed form and pick up medical records (as necessary). Recommended for this to take place when Assessor picks up and scan original BEERS documents
5. Use the SF86/NASIS/PRC.
   a. Electronically send NASIS User name and Password to Applicant and have them complete SF86.
   b. Assessor can have applicant physically initial and sign completed SF 86 and DD FROM 369 at a later date. Recommended for this to take place when Assessor picks up BEERS and DD FORM 2807.
   c. PRC's to be ran IAW local civil authority protocol.
6. Get a second opinion.
   Find a different Recruiter/Assessor, LPO, or DLCPO/Director to screen your applicant. Time can be saved by having a second person screen your applicant for any missed blueprinting information.

7. SSN requirements
    a. All applicants must have a valid SSN card prior to processing
    b. Applicants may DEP with Social Security Printout (SNAP), but will be required to have original SSN card prior to shipping.
    c. SSN cards stamped "issued for work purposes only" are not authorized.
8. Education requirements
    a. Unofficial transcripts emailed to recruiter are ok for processing. Official Transcripts need to be mailed directly to the recruiter or sent via Educational Institutions electronic delivery method. Note if sent via email it is highly encouraged to include a copy of the email sent to the recruiter as proof of direct transmission.
    b. Applicants enlisted with a school closure letter must have CO approval prior to DEP. However, education verifications must be submitted immediately upon the school's re-opening.
    c. EDVER's can be completed IAW Educational Institutions requirements. Email and Fax are top recommendations.
    d. High school seniors may DEP up to 15 months, but must have a "WILGRAD" with 70% of required graduation credits and an estimated graduations date to ensure shipping does not occur prior to 14 days after graduation date.
    e. Post-secondary degrees (K or N) need to be screened IAW OPO for commissioning programs.
    f. Tier 2 applicants must have a minimum of a 50 for their AFQT.
    g. Applicants enlisted with a school closure letter must have CO approval prior to DEP. However, education verifications must be submitted immediately upon the schools re-opening.
    h. At a minimum, school closure letters should have the full name of the school, complete address, phone numbers, and a school official's contact information. Als,o include the dates of closure and the projected date of return.
9. Dependency requirements
    a. Properly verify a qualifying dependent i.e., spouse, natural children, step children, step children of spouse, and any parent or person who can be claimed as a dependent on an applicant's tax return.
    b. Natural children include legitimate, illegitimate, and unborn children.
    c. Refer to CRUITMAN chart for number of allowable dependents and waiver requirements.
10. AFQT requirements
    a. Prior service NAVETs do not require an ASVAB provided they enlist in last held rating.

b. Have every applicant take PiCAT. Instructions can be sent via email. Schedule Verification test IAW MEPSCOM policy
c. Request HS Pull as necessary
d. Schedule ASVAB IAW MEPSCOM Policy without PICAT only if deemed appropriate by DLCPO.

11. Conduct requirements
    a. Ensure all offenses are properly charted IAW CRUITMAN for seriousness of offense (100-400 series).
    b. 5 or more traffic offenses require a waiver; 5-7 non-traffic offenses require a waiver; 1 misconduct requires an Eligibility determination; and 2-4 misconducts require a waiver. All felonies regardless of final outcome or disposition must be reviewed by NRC (OOJ).
    c. Commensurate authority may be used in CO absence. Pay attention to Non-delegable waivers.
    d. Physical violence will require CO interview and or waiver depending on disposition of that offense.
12. Drug and alcohol requirements
    a. Ensure waiting periods are met. MJ may not ship within 90 days; LSD is a 2-year waiting period and all other drugs are a 1 year waiting period. BTWs require a 1 year waiting period.
    b. Positive DATs at MEPS for drugs are permanently ineligible for service, no waivers authorized. Applicants testing positive for alcohol may be given a second DAT no earlier than 46 days from the initial DAT and will require a NRD CO waiver.
    c. Native American applicants that use Peyote for religious ceremonies may be processed IAW CRUITMAN VOL II (page 212-213). All other uses of peyote are normal drug use and waiting period/waivers must be completed.

<u>**Prepare enlistment documents**</u>

1. Only use the most updated version of enlistment documents found on the NAVCRUITCOM directives and forms web page. Stand-alone E-kits are not authorized due to PII concerns and the potential for use of outdated or unauthorized forms.
    a. Review each form via phone or FaceTime with applicant. Save forms for quick access when meeting in person for signatures. This will reduce the amount of face-to-face interactions with applicant.
    b. With the exception of forms for Navy Reserve kits and Officer Accessions, Biometric signatures are required. All recruiters must be issued or have access

to a fingerprint scanner. Only devices issued by Navy Recruiting Command are authorized to perform this task.

c. MEPCOM approval is required to authorize the use of electronic signatures where original wet signatures are required.
d. All recruiters are required to process applicants via PRIDE MOD. Accessions documentation, including but not limited to supporting documentation and completed waivers will be uploaded and submitted.
e. Recommend enlisted kit submission to MEPS at least 48 hours prior to the applicant's projection date for quality control checks.
f. NRC Guidance/SOP on Electronic Signatures is required in order to enable Virtual Kit Processing (example Doc-u-sign)

2. Quality Assurance
   a. QA is the responsibility of ALL HANDS, not the MILP or NLO personnel.
   b. Can be completed in accordance with current NRD/NTAG directives via PRIDEMOD
   c. All hands must follow PII guidance.
   d. Personal media devices i.e. laptop computers, hard drives, thumb drives, DVD, cameras, etc. are prohibited for processing documentation/information for enlistment of applicants.
   e. For accessions, PRIDE MOD provides an archive of residual files.
   f. Recommend hard copy residual records be maintained IAW MEPCOM, CRUITMAN, and local command instructions.
3. USMEPCOM form 60-3A-E
   a. Used for initial MEPS visit and test/retesting of applicants
   b. Must be submitted with applicants' projections
   c. Photo I.D. is used for identity and enrollment into biometrics in conjunction with 680. NOTE: Any ID aside from state or government issued items should be screened by NLO personnel for pre-approval. ID must be valid and photos match the applicant's physical appearance.
   d. Incomplete or inaccurate 680s may result in MEPS not testing or not releasing test scores until corrected.
   e. Send form to applicant via email, FB PDF, or other means as approved by NRD/NTAG
   f. Applicant and Processor can verbally review each question via phone or FaceTime so that Assessor may electronically record all responses and information on the MEPSCOM 680.
   g. Assessor can have applicant physically initial and sign completed form at a later date. Recommend for this to take place when Assessor picks up BEERS, SF86, and 2807

4. Enlistment checkoff
    a. NLO personnel will update MEPS TRACK with any missing or needed items for enlistment.
    b. EPDS is ultimately responsible for QA and maintenance of all residual records.
    c. CO is responsible for ensuring an acceptable level of QA is maintained.
    d. Can be completed via electronic communications as approved by NRD/NTAG
5. DD Form 368
    a. Required to enlist any applicant currently under a reserve component of any branch.
    b. PERS 913 is approval authority of this form, not the NOSC CO.
    c. Prepare document via Phone or FaceTime with applicant and schedule a face-to-face meeting to sign document. Recommend to do this in conjunction with other document signings and pick up.
    d. No Change to the process of submitting DD FORM 368.
6. DD Form 369
    a. All applicants are required to have at the very least a electronically signed "Blank" 369 in their kit.
    b. PRCs are required to be sent to law enforcement if a conduct waiver is required, program conduct eligibility determinations, Nuclear Field, Tier II/III applicants, or an applicant is considered a risk based off the interview process.
    c. When sending out a PRC, it must be sent to city, town, county, state, and juvenile authority where any waiver-requested offenses occurred, and where the applicant resided for the last 3 years.
    d. EPDS is responsible for mailing, tracking, and filing of PRCs.
7. DD Form 370
    a. Required for all applicants requiring an NRC enlistment waiver.
    b. Do not give this form to an applicant under any circumstances.
    c. School references may be used if unemployed 3 years prior to enlistment.
    d. No Change to Process. Recruiter should email this form directly to Reference, as PII should not be contained. Once receive back from Reference via electronic means or snail mail then add Applicants PII. Recommend to print out the email to prove direct interactions.
8. DD Form 372
    a. No issue with conducting via email or scan from vital statics agency.
    b. Used in place of primary birth verification for DEP only.
    c. Do not use for verification of birth of Dependents.
9. DD Form 1966
    a. Overall accuracy is NLO's responsibility, but complete and accurate information must be completed prior to projection by the recruiter.

b. Pen & ink changes are acceptable, except block 2 (name).
c. This form is a “live, working” form and will not be finalized until member’s ship date.
d. Review form via phone or FaceTime with applicant. Save form for quick access when meeting in person for signatures. This will reduce the amount of face-to-face interactions with applicant because all questions should have been answered via phone of FaceTime conversation.
e. All recruiters should have been issued or have access to a fingerprint scanner for biometric signatures. Only devices issued by the recruiting command are authorized to perform this task.
f. Ensure you confirm with your NRD/NTAG personnel for required "WET" signature requirements.

10. NAVCRUIT 1130/120
    a. Used to determine enlistment eligibility based off aberrant behavior, racially biased group, gang related violence, initiation/acceptance activities, and hate crimes.
    b. Ensure all blocks of this form are initialed by applicant under “NO” except question 7, which certifies that the form was completed honestly at the applicants own free will. Applicants get used to signing “NO” for all blocks on forms and this may be overlooked by the recruiter.
    c. Review form via phone or FaceTime with applicant. Save form for quick access when meeting in person for signatures. This will reduce the amount of face-to-face interactions with applicant because all questions should have been answered via phone of FaceTime conversation.
    d. All recruiters should have been issued, or have access to, a fingerprint scanner for biometric signatures. Only devices issued by Navy Recruiting Command are authorized to perform this task.
    e. Ensure you confirm with your NRD/NTAG personnel for required "WET" signature requirements.
11. SF-86
    a. Required for all applicants to initiate a Personnel Security Investigation (PSI).
    b. All requests must be electronically sent to OPM via NASIS, including fingerprint submissions. EQUIP pages and fingerprints should be submitted at the same time.
    c. Recruiters ensure an accurate completed copy of the SF-86 is included within the enlistment kit. Recruiters can upload a copy of the SF-86 in PRIDE but will not submit it. It should be maintained for reference purposes only.
    d. QA of this form is essential and starts with the recruiter. Inaccuracy of this form will delay the processing of applicants for DEP.

e. Prior Service applicants with a break in service greater than 24 months require a (T3) opened or scheduled OPM investigation before they will be allowed to continue processing. Due to lengthy time involved in OPM reviews, express this to the applicant and submit the SF-86 as early as possible.
f. All recruiters utilizing SF-86 to process applicants must have administrator access to obtain usernames and passwords for applicants

12. Use CRUITMAN forms list.
    a. Forms Recruiters/Assessors are responsible for.
    b. Knowing what forms are needed for an individual applicant.
13. Prepping the enlistment documents in advance.
    a. Knowing all the information about the applicant.
    b. Making the enlistment process as easy as possible.
14. Check for errors.
    a. Cross check any forms with BC, SSN, DL, etc.
    b. Have your work quality checked if possible.
15. Biometric Signatures
    a. The use of biometric signatures is authorized with the use of a fingerprint scanners in conjunction with PRIDEMOD II.
    b. Not all forms are biometric capable and some MEPS still requires wet ink signatures on USMEPCOM 680 and DD FORM 2807.
    c. The applicant will sign all capable forms with their fingerprint and the recruiter/assessor will sign using their CAC card and pin.
    d. There needs to be NRC Guidance/SOP on Electronic Signatures to enable Virtual Kit Processing (example Doc-u-Sign)

Applicant Waiver Eequests

1. Waiver categories include moral, mental, physical, etc.
2. Submit waivers IAW "Whole person" concept
    a. Apply for a waiver only if highly favorable traits or mitigating circumstances exist, which outweigh the reason for disqualification.
    b. Submit if the enlistment is clearly in the best interest of the Navy.
    c. All documents and required forms can be submitted electronically.
3. Waiver authority level
    a. COs may disapprove a waiver that requires higher authority for approval without the need to "send-up" for disapproval, but may not approve a waiver without "sending it up" when higher authority is required for approval.
    b. COs may delegate waivers at their approval level, but when authority may not be delegated IAW CRUITMAN, only the Acting CO (XO) may approve.

4. Documentation
   a. Ensure waiver checklists are followed and included in waiver package.
   b. Waiver brief sheet (NAVCRUIT 133/39) starts with the recruiter and must be properly completed with all offenses listed whether or not the offense needs a waiver (Whole person concept).
   c. "Hand-written" personnel statements are required unless the offense is minor traffic resulting in a fine of less than $100.
   d. Waiver entries must be completed on DD Form 1966 and may be delegated from CO to NLO to be completed.
   e. OSVET applicants will require waiver determinations for Navy accession standards even if the waiver was previously approved by another service.
   f. NAVET and OSVET applicants must disclose all medical and police involvement regardless of time frame, disposition, or previous waiver approval for any condition(s). They must meet current Navy standards.
5. Charting
   a. Charting of enlistment waivers and Program Eligibility Determinations (PEDs) is essential. Do not expect NLO or upper COC to catch waivers that need to be charted and approved. Always include references to COC for waiver circumstances.
   b. Chart conduct and drug/alcohol charges separately and then drug use. A conduct charge may require both a conduct enlistment waiver and a separate Drug/Alcohol offense waiver. Example: A DUI would require both a conduct Eligibility determination for 1 misconduct offense and an CO level Alcohol offense for 1 BTW.
6. Use CRUITMAN forms list.
   a. Forms Recruiters/Assessors are responsible for.
   b. Knowing what forms are needed for an individual applicant.
7. Prepping the enlistment documents in advance.
   a. Knowing all the information about the applicant.
   b. Making the enlistment process as easy as possible.

Applicant Security Requests

1. Security requests include Personnel Security Investigation (PSI)
2. NASIS (SF-86)
   a. Every applicant will need to have a NASIS account set up for them. You will have the ability to go into NASIS and create them an account with a username and password. It is important that they start on this immediately since it asks for a lot of information. DO NOT wait to do the applicants NASIS even if they are

pending a medical read. They can have it done and completed by the time they process.

b. The applicant will complete, you will review and validate checking for accuracy and errors and then you will submit it to MEPS electronically through the NASIS system.
c. Explaining NASIS process to the applicant.
d. Explaining to the applicant the importance of complete and accurate information about their background.
e. Letting the applicant know that it is possible that they may get contacted by an investigator to ask them questions about their background.
f. Advise civilian applicants who require a security clearance for work purposes that a SF-86 will be required. For Active Duty, Prior- service or NAT applicants with a current clearance contact DONCAF for guidance before a new SF-86 is submitted. In all cases a SF-86 should be completed and retained in NASIS and uploaded in PRIDE for reserve applicants.

3. Reviewing
   a. You first review and validate the NASIS for any error.
   b. Go line-by-line with the applicant to ensure accuracy before submitting the NASIS. MEPS processors will do this. They do not have time to fix it for you so it is vitally important that the NASIS is accurate before submitting to MEPS.

Schedule Military Entrance Processing Station (MEPS) Applicants

1. Use of computer applications for projections
   a. PRIDEMOD was established to eliminate the need for a paper kit. All forms can be uploaded into PRIDEMOD.
   b. MEPSCOM/NRD/NTAG policies and requirements may vary but should accommodate PRIDEMOD, Email or fax transmissions for projections
   c. Accurately complete projection via Salesforce/ARM to be accepted via PRIDE MOD II.
   d. Using Salesforce/ARM, the recruiter/Assessor will need to build a complete record and complete projection to PRIDE-MOD II. From PRIDE-MOD II you will complete your projection to MEPS.

NOTE

MIRS (MEPS integrated resource system) may require separate projection in addition to PRIDE-MOD projection for testing, physical/DEP, Shipping, etc.

2. Documentation
   a. Include 680 when projection is required for testing/initial visit.

b. Include 1966/5 parental consent and 1133/97 if required for 17-year-old applicants.
c. Submit completed/accurate Enlistment kit to MEPS NLO IAW NRD/NTAG/TAOC regulations/time-line for proper scheduling and screening of applicants. Two days should be the minimum standard for this.
d. 2807-2 needs to be submitted to CMO for any questionable items prior to scheduling of projection.

3. Communication
   a. Communication is key. It needs to flow both ways from production to processing and vice versa.
   b. Projections needing to "floor" next week, should be submitted this week. Always consider MEPS maximum floor counts, they are based on MEPS personnel manning, not NLO personnel manning.
   c. Utilize MEPS TRACK, but it is only as valuable as the information you post in it. MEPS TRACK is now processed via PRIDE-MOD.
4. Maximizing Floor Counts
   a. Filling the space. It is important as an Assessor/Recruiter you try to maximize space available first. Example: The applicant wants to process on Tuesday, however there is space available on Monday. You need to try to fill up the floor counts at MEPS for Monday before scheduling for Tuesday.
   b. Knowing Floor Counts. Know how many processing spots that you have for your MEPS each day. Make sure that you are communicating amongst your DET/DIV and with NLO to ensure that you are not over projecting. You also need to know if there are extra spots available or less spots available due to MEPS closures.
   c. Wherever possible an EVENFLO manager should be appointed by the Chain of Command to assist in the management of floor space.
5. Transportation
   a. Use of command approved shuttle services are authorized. Commands will determine the areas where shuttle services are deemed necessary. Recruiters with shuttle service capabilities should include the transportation schedule into their prospecting plans.
   b. Shuttle service may be a monthly contract with designated dates and times for pickup and drop off. Transportation may also be utilized by purchasing tickets as needed. In either case, recruiters need to be aware of the rules for these services and maintain a good working relationship with the service provider.
      - Clearly communicate with Chain of Command to ensure sufficient tickets are available to accommodate monthly average of required tickets
      - Arrive at the destination early
      - Brief the applicant on the transportation rules.

- Check and verify the applicant has all the necessary items including documentation and clothing
- Work with other military recruiters and branches to maximize shuttle occupancy.
- Remember ROI, if it's not being used it will go away.

c. If shuttle services are not available, every effort should be made to consolidate MEPS runs to reduce face-to-face interactions.

Military Entrance Processing Station (MEPS) Briefs

a. Explain the testing, hotel, medical, processing, and classification processes.
b. Timelines: Night test next day processing or same day processing from hotel to enlistment.
c. What to expect: Make sure that applicants understand that they will undergo several tests:
    - Hearing test
    - Vision test (bring glasses and contacts if applicable)
    - Blood draw
    - Drug test (permanent rejection for positive test result)
    - Perform duck walk (which checks for inner ear equilibrium)
d. Review the 2807, 2808, and the background check with the applicant. Reiterate that a failure to disclose information to the recruiter may result in delays, wasted time for all parties involved, and permanent disqualification.
e. Discuss grooming habits and personal conduct while at MEPS. Define what mentally, morally, and physically qualified to join the Navy means.
f. Can be completed via phone, FaceTime, or other command-approved methods.

2. What to consume and not to consume.
    a. No alcohol (even if 21): All applicants regardless of age will have to use the ADD (Alcohol Detection Device) upon checking into MEPS. The applicant cannot process with alcohol in their system.
    b. No energy drinks or tobacco: Both of these things can potentially elevate a person's heart rate and blood pressure. If this happens the applicant will have to get clearance from their own doctor and have three different blood pressure readings, have their doctor fill out a form and the submit back to MEPS before they can continue with their process, substantially elongating their enlistment process
    c. Make sure to tell the applicant to drink plenty of water and be hydrated. This is important for several reasons. (Health, Urinalysis, Blood Draw)
3. USMEPCOM

a. Motto is: "Freedom's front door" and mission is: Ensure the quality of military accessions during peacetime & mobilization IAW established standards.
b. Headquarters is located at NTC Great lakes and USMEPCOM is divided into 2 sectors (East/West) with 65 military entrance processing stations to include +2,500 personnel both military and civilian.

4. MEPS elements
   a. Testing element administers more the 500k ASVABs per year. Testing is responsible for administration, scoring, coding and entering all data into MIRS. Testing terminology includes night tester, SDP, high school pull, confirmation test, and SPF.
   b. Medical element administers 333k physicals per year. Medical process includes medical check-in (main desk), medical control desk (pre-screens/dial a DOC), vision and hearing exams, individual exam(history/screening), LAB(HIV/DAT), height/weight, orthopedic exam, and profile qual/disqual. Medical terminology includes: PHYS only, Full PHYS, inspect, PHYS/DEP, consult, med read, dial-a-Doc, and P-U-L-H-E-S.
   c. Processing element performs the necessary actions to receive, orient, interview, process, enlist, and report applicants for enlistment into the Armed Forces. Responsible for scheduling, DEP-in processing, projections/cut-off times, walk-ins, pre-enlistment interviews, additional disclosures/with-holding of INFO, pre accession interviews, QA, packet breakdown and transportation to basic training. NLO office includes EPDS, MILPO, EPA, waiver clerk, Senor Classifier and Classifiers.
5. MEPS expectations
   a. All applicants are to be provided transportation to MEPS in order to arrive before scheduled "opening" time. Usually before 0600 but differs across different MEPS.
   b. Brief applicants that everyone will be searched/ go thru a metal detector prior to entering the MEPS building. No weapons (pocket knives etc.) authorized.
   c. Make sure to tell the applicant to drink plenty of water and be hydrated. This is important for several reasons (Health, Urinalysis, Blood Draw).
   d. Brief applicants on length of Day. The day will start early, medical will usually last until lunchtime, and then the processors will have them for the rest of the day until swear-in times.
   e. Counsel applicants on the rating compatibility process
   f. Applicants want to know about jobs…
      It is important to sell the Navy not a job. Almost every single applicant will ask you about job selection at some point. This is a key point in a sale or joining

process. How you handle this can have an effect on the decision making of the applicant.

g. You need to let the applicant know that they will find out what they qualify for at MEPS. We in the field have no way of knowing what the ASVAB score will be (if they haven't taken it), what their physical might turn up, and/or if what they would want is even available. Keep them from getting job-lock by explaining the process and selling the Navy as opposed to just the job.

6. Mission of Classification
   a. To make possible the most effective utilization of available manpower, both active duty and reserve.
   b. Job selection is not always about what the applicant "wants" or qualifies for. NCO goals are important, but so is Active/Reserve component shipping, prior service, and Nuclear Field. Shipping placement based on job availability and the shipping targets on NETCON is key. Placement should always be needs of the Navy 1st, NRD/NTAG goals, then applicant's preference. This is why it is essential to sell the Navy, not a job!
   c. Functions of Classification include: determine job potential, evaluate data, recommend training based on interests, qualifications and availability, record data, NEC coding, and administer tests. No processor "likes" a "Job locked" applicant, but talking to the applicant about general interest based off of communities may be helpful, i.e. Surface, Subs, Aviation, Construction, etc.

<u>Coordinate Medical Screening and Testing of Applicants</u>

1. Medical Screening
   a. You will have to submit a 2807-2, USMEPCOM 680, and all pertinent medical documents for the CMO to review. This is for cases that require medical screening before the applicant can process at MEPS.
   b. Send form to applicant via email, FB PDF, or other means as approved by NRD/NTAG
   c. Applicant and Processor can verbally review each question via phone or FaceTime so that Assessor may electronically record all responses and information on the DD FROM 2807.
   d. Assessor can have applicant physically initial and sign completed form at a later date as well as pick up any medical records necessary. Recommended for this to take place when Assessor picks up and scan original BEERS documents
2. Testing includes Armed Services Vocational Aptitude Battery (ASVAB), Pending Internet Computerized Adaptive Test (PiCAT) verification, Aviation Selection Test

Battery (ASTB), Navy Advanced Programs Test (NAPT), Defense Language Aptitude Battery (DLAB), Officer Aptitude Rating (OAR), etc..

3. ASVAB/ PiCAT
   a. The ASVAB can be taken at the applicant's high school, an approved MET site, or at a MEPS facility.
   b. The PiCAT can be given at an applicant's home. They will have to take a confirmation test. This is a test to make sure that integrity was kept during test taking.
   c. Need to brief your applicants about retesting policies. If the applicant has taken the ASVAB the PiCAT cannot be given. One PiCAT only can be take per applicant. Retesting on the ASVAB 30 days 1st retest, 30 days 2nd retest, and 6 months after the 3rd test has been taken.
   d. Prepare document via Phone or FaceTime with applicant and schedule a face-to-face meeting to sign document. Recommend to do this in conjunction with other document signings and pick up.
4. ASTB and OAR
   a. OAR and ASTB must be administered in person. (NAMI protocol)
   b. These tests can only be taken 3 times in a lifetime. The only persons allowed to give these tests are Command Designated and NAMI approved Test Administrator
   c. Coordinate with your testing proctors for a time and location to come in at one of the various testing sites within your AOR. Go through a COVID Pre Screen Questionnaire for symptoms and have them complete the ASTB online questionnaire prior to reporting for testing to reduce the amount of time spent in testing site.
   d. Sanitize room and testing computer. Key Board and mouse can be covered in protective plastics for easy cleaning. ASTB controllers can be covered as well. Sanitize after testing completed.
5. NAPT and DLAB
   a. Tests are both given at MEPS and can be schedule through a projection. The NAPT is for Bravo qualified NUKE applicants and the DLAB is for applicants that are going for CTI.
   b. The NUKE Field Coordinator has the ability to administer the NAPT at approved alternative locations. Must adhere to all testing administration and security policies.

<u>Coordinate Enlistment, Commissioning, and Remote Swear-in Ceremonies</u>

1. MEPS swear-ins (traditional method)

Ensure applicants are processed for swear in by cut-off time for processing. Example of processing cut-off may be all applicants must be ready for enlistment swear-in by 1500. ETP (exception to policy) may be submitted for approval or a possible hold over may be required.

2. Remote swear-in
    a. MEPS/NLO both need to be aware in advance (at time of projection) if the applicant is going to be a remote swear-in.
    b. Ensure the Enlisting Officer is confirmed and their information is given to NLO to be entered into the enlisting documents (DD FORM 4).
    c. Oath of enlistment can be done virtually, but the signature on the DD FORM 4 must be witnessed. (this would need further guidance and approval through MEPCOM for electronic signature)
    d. Enlisting Officer must conduct pre-enlistment interview UMF-601-23-7
    e. Enlisting Officer/Commissioning Officer: Must have reviewed NAVADMIN on Remote Swear In's and all applicable instructions.
    f. Assessor has the ability to create enlistment forms.
    g. Step-by-step guidance needs to be given by EPDS to include timelines for submission.
3. Swear-in and Commissioning Ceremonies
    a. Ceremonies are the applicant's first experience as a Sailor. It is a very important event for these applicants and their transition to a Sailor.
    b. Ensure proper planning is utilized to ensure the event is conducted professionally and in accordance with Command guidance.
4. Social Media
    a. Use social media for Navy awareness. (Facebook live for example)
    b. Involve your PAO in these big events so that you are in accordance with NRC social media policies.
    c. Contact National Social media team for further guidance
    d. Social media release must be obtained so that the applicant can be tagged in the post. Once the applicant is tagged on social media all the pictures and videos will show up on their post for all their friends, family, and social media followers to see. This will help you generate Navy awareness, interest, and referrals.

Central Classification

1. Job Inventory Matrix (JIM)
    a. JIM must be completed and should only include qualified jobs and jobs that are not over sold Navy wide.

b. Once JIM is completed, NLO will send down to PRIDE SHOP central classifier and they will normally process request within 5 business days.
c. Once Central classifier obtains a reservation, a letter will be submitted to applicant via command Senior classifier to the EPDS/NLO office.
d. Applicant will have 3 business days to make a decision to accept or decline job.
e. Can be completed electronically via audio and visual means. Example: Classifier on phone with applicant and visually via FaceTime, reviews form/job/contract/etc. with applicant, applicant agrees, classifier completed action. Completed forms can be sent to applicant for signature along with Remote Swear in Contract.

2. Best uses
   a. Use for applicants not processing for Nuclear, Special Warfare or other advanced programs.
   b. Use for applicants that need consults, medical waivers, etc.
   c. Use for your QNJs.
   d. Use for possible re-classes with approved DARs.

Counsel rejected applicants

1. Waivers
   a. If a waiver is possible, explain the process.
   b. Always display a positive attitude, but do not promise anything.
   c. Can be completed via phone, FaceTime, or other command approved means.
2. Recommendations
   a. If Naval service is impossible, recommend other life enhancement opportunities.
   b. Recommend other services. Other services have slightly different standards, referrals develop open lines of communications and increase the potential for referrals to the Navy.
3. Choice of wording
   a. Reframe from using the word "failure". Example: If an applicant did not score high enough on the ASVAB, tell them they didn't acquire the minimum score and recommend studying/explain the re-test policy.
   b. Always be honest and transparent with each of your applicants.

Transition Future Sailors (FSs) to Onboarding (where applicable)

Hand-Off

1. Conduct a video conference via approved methods to have a three-way call with Assessor/recruiter, the Onboarder/recruiter, and the Future Sailor

2. Make sure the FS understands the next steps and he expectations during the course of enlistment.
3. This hand-off should occur immediately following the Enlistment, and then at required intervals in accordance with the recruiting manual.

Assemble Prior Service Reserve Component (RC) Residual Records

1. Copy of the entire enlistment kit.
   a. A paper copy of all documents pre- and post-enlistment affiliation documents must be maintained for two years to the month from enlistment/affiliation. The CRUITMAN 1130.8 has a list of all forms needed. These forms need to also be loaded into PRIDEMOD II.
      - Requires MEPCOM guidance on electronic documents and signatures
   b. Common mistakes:
      - Missing SGLI, Direct Deposit.
      - Missing drill verifications.
      - Missing signed copy of orders.
   c. Coordinate with the chain-of-command for the storage of residuals. Electronic storage for residual files may be suitable in some cases.
   d. If physical reviews are to be completed reviewer will coordinate a group pick up and review of all records on a monthly basis to reduce interactions at stations
2. Have all forms completed.
   a. Completing all forms pre and post enlistment/affiliation will save you time and result in less residual kit errors.
   b. Required forms for residual. Just because the post enlistment/affiliation forms are not required for kit approval from NRC doesn't mean that we don't need them. They are still required forms and they are required for the residual kit as well.
3. Recruiter, LPO, DLCPO, EPO roles.
   The residual needs to be completed within three days of enlistment/affiliation. This means all forms completed should rechecked by you, the LPO, and DLCPO and verified in PRIDE so that the EPO can sign off on the kit at the end of the month.

Qualifications

1. PQS
   a. Line items should be signed off by personnel authorized on the Command Qualifiers list.
   b. Review the CNRC 1500 instruction for guidance on required timelines.

c. Review the CNRC 1136 instruction for applicable PQS to download electronic PQS documents
d. Contact Command Trainer for scheduling PQS Board

2. JQR
   a. Line items shall be signed off by personnel authorized on the Command Qualifiers list.
   b. Review the CNRC 1500 instruction for guidance on required timelines.
   c. Review the CNRC 1136 instruction for applicable JQR to download electronic JQR documents
   d. Contact Command Trainer for scheduling JQR Board
   e. Video Board
   f. Boards can be held virtually from anywhere with a reliable internets source and capable media device in accordance with command policies.

IV. Onboarding/Recruiter

NOTE

Collegiates below are defined as Active Duty Programs only

Mentor Future Sailors (FS's) and Collegiates

1. Utilize FaceTime/Skype to conduct mentoring sessions.
   a. Most of today's cell phones have built in software to connect with callers virtually. Upon first contact with Future Sailor/Collegiate, verify what software they are able to use and create accounts as needed during Indoctrination.
   b. Approved social media platforms can also be utilized. Examples are FB messenger, MS Teams, Go to Meeting, and Zoom.
2. Conduct two Future Sailor mentoring contacts each month
   a. Commands are highly encouraged to create "How to tutorial", on conducting a proper mentoring session with training topics and assignment due dates for accountability and tracking purposes.
   b. Future Sailor PQS and referral progression tracking sheet
3. Conduct Collegiate Mentoring Sessions
   a. Collegiates need to keep GPA up to maintain program requirements. They often have hectic schedules and time management is essential.
   b. Have a Collegiate find a quiet space to meet, preferably in their favorite professor's classroom or lab room. This promotes conversations with the professor and educates them on officer programs with the potential to develop new a COI.

c. Do not schedule mentoring with only 15-20 minutes to spare. A rushed mentoring session takes away from the importance and makes the Collegiate feel like a "check in the block" and the session is not considered genuine.
d. Due to logistics, a Collegiate may do a face to face with another Navy Representative as approved by the OACR.
e. Have the officer recruiter do the mentoring on the phone or via FaceTime and have the other Navy Representative conduct the height/weight, bf measurements, etc. in person.

4. Include the spouses and significant others in the mentoring. Initiate genuine conversations and develop a professional mentor relationship. Talk marriage, children, and things of that nature. They will have questions about what documents are required, how a PCS works, and what the implications of these life decisions will have on their career. These mentorship sessions, if done properly, will expose any hesitations or concerns enabling the recruiter to use Valor to overcome or address points of contention.
5. Revisit VALOR Pressures, Plans, Unique Value
   Fortify the reasons for joining in the first place. Some Future Sailor/ Collegiates you may have been working with for 2 months, so the reasons for joining are fresh. In other instances, some Collegiate you have been working for much longer, and life changes and so do circumstances.

Future Sailor (FS) and Collegiate Indoctrinations

1. 72 Hr. Indoctrination conducted within 48 hours of joining with all key influencers
   a. Commands are highly encouraged to create a "How to tutorial/ guide" on conducting a proper 72 hr. Indoctrination to include filling out required paperwork and Recruiter and Future Sailor responsibilities
   b. Conduct 72 hr. Indoctrination via Zoom, Face Time, etc.
   c. Ensure documentation is made in Salesforce
2. Electronic Forms are emailed or given to applicant upon swear-in.
   a. Onboarder/Recruiter needs to make contact with Future Sailor while still at MEPS in order to verify email and other contact information. In order to conduct virtual Indoctrination/72hr.
   b. Copies of needed documents should be uploaded into PRIDE. This is the start of their Electronic Service Record that is sent to RTC, OCS, ODS.
3. Conduct a Collegiate 72 hr. IAW the CRUITMAN
   a. 15 days to enlist from FINSEL, 3 days after enlistment for 72hr.

b. Ensure you are up-to-date on the current requirements for Collegiates including GMT's, Grooming standards, PRT cardio options, when and where to get their ID's, PHA locations, etc.
c. Many Collegiate will also be reporting directly to a CNRC Collegiate Manager. Ensure each Collegiate has been provided a copy of the Active Duty Collegiate Handbook.
d. Get a copy of the Collegiate's Schedule
    - You already have the Academic Degree Completion Plan (ADCP) but it is still beneficial to know day-to-day events and what days to include their extra-curricular events (sports teams, associations, fraternities, etc.).
    - Give them a copy of your Collegiate Meeting schedules and try to offer alternative dates to mitigate the loss of the DEP experience.
e. Discuss Leave and Liberty
    - Collegiates earn Leave days just as NRD personnel do. They may take leave within the US so long as they provide leave information.
    - Leave outside the US requires additional documentation (computer access and training requirements will need discussed during indoctrination process), CO level approval and must be approved by CNRC. This ensures no Background/Security issues arise. Do this planning early; as it must go through the proper channels and takes time to do so.

Phone Contacts with Future Sailors (FSs) and Collegiates

1. Due to lack of in person contact, phone contacts should be conducted via FaceTime/Skype or other command approved platform.
    a. This will help build rapport with Future Sailors by being more personal during conversations and not just a voice that is never seen. It will also assist to identify possible weight issues.
2. Collegiate contacts are only once a month
    a. Ensure you complete all questions on the Recertification form and list everything discussed in detail when you have your monthly phone contact.
    b. DO NOT let them just text you for their monthly phone contact.
    c. Schedule contacts
        - Keep it simple and easy to remember. Look at the collegiate schedule.
        - Even though they are in the DEP program they are treated slightly different that an enlisted Future Sailor. Remember: an enlisted Sailor just has to pass High School and most meetings and check-ins are outside "school hours;" Collegiate have to maintain GPA's in order to remain in the program, and their professors and schedules are not as forgiving.

d. Time Management
   Make time in your schedule for these contacts. Because they are only required once a month means you need to spend more quality time with them to uncover any potential shipping issues as well the development of the professional relationship.

Officer and enlisted Delayed Entry Program (DEP) Recertification

1. Recertification sent via email and completed via video call with each Future Sailor.
   a. Recertification can be digitally signed and completed during video mentoring sessions and/or DEP Meetings IAW instruction.
   b. Once completed send back via email of .jpeg or .pdf file.
2. Required monthly recertification
   a. Have a monthly mentoring schedule so that Future Sailors can sign up for a specific time slot
   b. Recommend Leadership continue to train recruiting personnel to assist in determining potential shipping issues due to the decreased availability of face to face contacts.
3. Collegiate recertification will be completed once per month
   a. Completed via telephone and will need to be annotated on the Recertification by the recruiter and placed in the residual.
   b. Face to Face should occur every month via video conference. Ensure the Collegiate completes these and signs them for the residual file.
   c. Ensure you talk about GPA and any known issues that might be happening with the Collegiate and discuss any finding with Chain of Command.
4. Pre-filled recerts
   The benefits of pre filled names, dates, rates, height/weight etc. is for accuracy and legibility of recerts and having them in one, centrally located, binder for all Future Sailors/Collegiates makes for quicker administrative processing.

Hold Harmless Agreements and Release from Liability Certificates

1. Have a PT binder
   a. Before each PT session ensure you have each FS/Collegiate verify their emergency contact information is still accurate and initial with date right on the Hold Harmless. Update as necessary.
   Discuss a Virtual Physical Training Session in accordance with command directives and NRC guidance
   b. Ensure you maintain a digital copy from each Future Sailor/Collegiate

c. Ensure authorization is authorized and conform to social distancing protocols when applicable

Delayed Entry Program (DEP) Personnel Qualification Standards (PQSs)

1. Onboarder/Recruiter sign and complete Future Sailor Dep PQS during mentor sessions and keep on file electronically. Future Sailors should have an electronic version of PQS study guide.
2. Facebook Watch Party - Conduct training on PQS
3. Facebook Videos (prerecorded) - Allows Future Sailor to learn at their pace
4. PQS Tracking Sheets
   a. Ensure each Future Sailor has downloaded eHelm (new App for Future Sailor's to train on)
   b. Review and verify each Future Sailor is accomplishing required PQS milestones
5. Training teams
   a. Establish study groups for Future Sailors so they have teammates to help them in their progression.
   b. Have a Team lead for each group, which mirrors Recruit Training Command leadership structure.
6. Collegiate are "Highly Encouraged" to complete the PQS, not required
   Use the PQS as a gauge to determine level of commitment. If they are taking time to learn the line items they will likely ship and provide referrals. If they do not learn the line items, they may just be going through the motions and an increased potential for shipping issues may arise.

Delayed Entry Program (DEP) Meetings

1. Conduct DEP meetings via FaceTime, Skype, Zoom, Go to Meeting, or another video conference app.
   a. Verify that all Future Sailors have the capability to login to DEP meetings. Depending on size of Dep, pool may need to conduct multiple meetings to be effective.
   b. Make sure that meetings are planned and informative. Using a video conference app that has screen share capabilities to share training slides or videos for everyone to see. Use E-tool kit for training topics.
   c. Make sure to have some fun competitive aspect to the meeting so Future Sailors look forward to coming to the next one.
2. GMTs are a requirement for Active Duty Collegiates

a. Conduct via Zoom, Microsoft Suites, or other approved content sharing platforms. Meetings can be recorded, and a log of chatter and muster can be derived for verification of training.
b. Most Collegiates do not have E-mail certificates on their CAC cards, so they will have issues accessing Navy E-Learning until PIV Certs are fully implemented.
c. It is easiest to download the training topic from Navy E-Learning when applicable to training delivery. Have all Collegiates sign a muster sheet, ensure a copy is placed in their residual records, and FLTMPS is updated with their training.

3. Coordinate Delayed Entry Program (DEP) meetings
    a. Make sure that meetings are coordinated with Future Sailors and that they are pre-planned for the upcoming quarter.
    b. Recommend the same login is used for every meeting to maintain continuity of meetings. This will help eliminate Future Sailors missing due to not knowing correct information
    c. Encourage parents, significant others, and influencers to attend.
    d. Request leadership and command approved guest speakers attend and conduct training topics ending with questions and answer sessions.
    e. Ensure a professional and quiet location to conduct the video conference
    f. Have a structured schedule for each meeting in accordance with eDEP Toolkit
    g. Military Facing movements can be incorporated into the meaning.
    h. Smaller Group, Social Distance Meetings (if mandated and when authorized)
        - Maintain 6 ft. rule and small groups of 10
        - When authorized to deviate from Virtual DEP Meeting
    i. Schedule separate meetings for Collegiates and Future Sailors
        - Collegiates have busy academic schedules. Saturdays usually work best and setting a primary and alternative date tends to help too.
        - Include your Urinalysis Coordinators and Command Fitness Leaders.
        - Semi-annual PRT's shall be conducted when authorized.
    j. Encourage Recruiters to attend
        - If you have a Collegiate Manager that does all the coordination, encourage the individual Recruiters on the call to support the meeting and further their knowledge of officer recruiting.

Submit Recruiting Referral Recognition Program Requests

1. 5305 submitted electronically by the Talent Scout/Recruiter and tracked by Onboarder/Recruiter.

a. Onboarder/Recruiter should have a DEP tracker electronically for referrals given to Talent Scouts/Recruiters.
b. All documents obtained should be submitted within 24 hrs.
c. Review and verify all entries have been made in Salesforce
d. Create binder with all 5305's and supporting documents for tracking

2. Collegiate paygrade promotions
   a. Collegiates can earn paid promotions based off the Collegiate Program they are enrolled in.
   b. Ensure referrals are documented on Re-certifications and supporting documentation is routed to the OACR and OPO for the Meritorious Advancement for Referral Letter. Once letter is generated and signed by the NRD/NTAG CO, it should be uploaded in PRIDEMOD and CNRC notified.

Future Sailor (FS) Advancement Ceremonies

Conduct ceremonies virtually and record to post to social media platforms.

1. Use common video conferencing apps and tag all Future Sailor to acknowledge and include them in ceremonies.
2. Post on Facebook, Instagram, LinkedIn, etc. and invite your COC to attend.
3. Invite family, friends, and Professors.
4. Utilization of Facebook watch party will increase opportunity to spread Navy awareness

Supervise Future Sailor and Collegiate Physical Readiness

1. Monitor Collegiate physical expiration dates
   Schedule a new full physical for any Collegiate with an expiring physical.
2. Monitor Collegiate PHA's: Collegiates get a 10-week notice just as NRD/NTAG Sailors do. They need a medical treatment facility/civilian provider to complete the required physical health assessment and PARFQ.
3. Highlight the importance of the Physical Fitness Self Reporting PG 13
   Collegiates will get an IST or PRT within the 1st week of reporting to OCS or ODS.
4. Conduct Physical Training (PT) sessions. Conduct Facebook live work out sessions at least once a week and require Future Sailors to attend at least twice a month.
   a. Utilize NOFFS group exercises and basic exercises.
   b. Incorporate Dep PQS knowledge in workouts to make fun.
   c. Discuss appropriate athletic workout attire prior to video conferencing sessions.
   d. Requires discussion at the NRC level for guidance on resuming physical fitness training sessions.
5. Create Virtual challenges based on honor system

   a. Nike Run Club for friendly competition and logging workouts.
   b. Future Sailor/Collegiate shall keep workout logs and submit to Onboarder/Recruiter.

Future Sailor and Collegiate Shipping

1. Have honest and sincere discussions with all Future Sailors. Create a “bench” of Future Sailor ready to leave and roll in with limited notice.

At every mentoring and contact, Onboarder/Recruiter should be managing expectations and ensuring that Future Sailors are ready to ship tomorrow!

1. Collegiate Shippers
   a. Ship dates may not be available
      Check with specific collegiate programs for release of official Ship date. Most programs will not offer an official ship date until after Program Completion, Licensing, and or Message Traffic Orders are released.
   b. Monitor CMR's (Collegiate Management Reports)
      These are due Jan 31st and June 30th each year for all Colligates. They are almost like mini shipping verifications as they include Grades, Physical status, most recent PRT results, and other pertinent information that could affect shipping.
   c. DO NOT let FULL physicals lapse. "A failure to plan on your part does not constitute an Emergency on the Medical Providers part."

Follow MEPS Guidelines for Physical Scheduling

   a. Adhere to Collegiate 6-month, 45-day, and 30/14-day guidelines set forth in the CRUITMAN to the max extent possible
      - 6 months mark varies for each program
      - 45-day PFA requirement is firm and must be entered in PRIMS. Work with OPL, OACR, and OPO for potential CNRC exemptions to this policy.

Delayed Entry Program (DEP) Custody Turnovers

1. Custody turnover through approved video conferencing application.
   a. If there is a handoff from the Assessor to the Onboarder/Recruiter ensure both are on the video conference. This will ensure a smooth handoff from one Sailor to the next.
   b. Ensure each Future Sailor turned over has applicable documentation in Salesforce.

c. Receiving recruiter should conduct a separate VALOR Sales Lab as part of the turnover to fully understand the needs and circumstances of the Future Sailor.
d. Ensure the Future Sailor/Collegiate sees that you are genuinely invested in their concerns and you are not "just another recruiter."
e. There is value in truly caring about your Future Sailor/Collegiates' well-being. This will be reflected as a decrease in shipping issues and an increase in referrals

2. Collegiate custody turnover
   a. Do a full analysis of the Collegiate record prior to your first virtual face to face with the Collegiate. You want to look well organized and minimize interruptions to both the Collegiate and your own schedules.
   b. Ensure record is updated in PRIDEMOD.
   c. You may get a collegiate transfer from another district, as this is very common with Collegiate Programs. Ensure the PRIDEMOD records and MEPS Pulls are completed as soon as possible.

<u>Delayed Entry Program (DEP)/Collegiate Attrition/Management</u>

1. DEP executive screening Virtually through approved video conferencing application.
   a. Conduct in-depth screening of all Future Sailors monthly
   b. Create DEP executive screening questionnaire to administer virtually to all Future Sailors each month
   c. Conduct DEP audits as dictated by command leadership for trend analysis
2. Monitor Re-certs and CMR's
   a. Most "attrites" from Collegiate Programs are due to Academic and Physical issues. Ensure we are also discussing legal/civil involvement.
   b. Communicate any concerns on shipping to your OACR/OPO accordingly.
3. Adverse Collegiate Management Reports (CMRs)
   a. Academic Counseling chits are issued by the NRD/NTAG CO as part of the CMR reviews as necessary. Ensure you express the importance of maintaining Good Academic Standing and follow the Academic Degree Completion Plans (ADCP) as set forth in the Collegiate's contract.
   b. Collegiates may be placed on FEP, be held from shipping, or potentially attrited from a collegiate program for failure to maintain Physical Fitness Standards. Ensure this is emphasized to ALL Collegiates.
4. Delayed Entry Program Action Requests (DARs)
   a. DARs are digitally signed and routed through email.
   b. Create an excel tracker to monitor the routing process and status
   c. Save electronic copy for possible updates
   d. Ensure Salesforce / PRIDE is updated.

   e. Stay in contact daily with Lead Classifier for opportunities to Roll-in/Re-class any of your Future Sailors
   f. Constant communication from special program coordinators and Classifiers is essential
   g. Nuke, Spec Op, IWC coordinators should contact eligible Future Sailor about roll-in opportunities
   h. Maintain awareness of sailors' eligibility for alternate ratings to take advantage of roll in seats.
5. Collect program and rating-specific shipping documentation (e.g., Hospital Corpsman (HM) transcripts)
   a. Documents need to be maintained via PRIDE and documented in Salesforce.
   b. Need to work with team in making sure that documents are collected as soon as Future Sailor joins.
   c. Onboarder/Recruiter will need to track to ensure that documents are in hand 30 days prior to shipping.
6. Rating specific verification checklist
   a. Future Sailors that joined with a specialty Rating will have a checklist placed in their DEP record to ensure all required documents are obtained prior to ship date.
   b. Checklist and documents will be submitted to MEPS at a minimum one week prior to shipping for verification
   c. Request an Official Copy of Transcripts to be mailed or emailed directly to the Onboarder/Recruiter. Print out email to verify direct contact with the academic institution.
   d. Request PRC following local PD and Court House directives

Officer and Enlisted Delayed Entry Program (DEP)-Out Briefings

1. Conducted through video conferencing apps. Use whatever video apps needed to meet with collegiate and Future Sailor.
2. Shipping brief
   a. Conducted 60 and 30-days prior to shipping as well as 24-hrs prior to shipping.
   b. Future Sailors are required to fill out an in-depth shipping questionnaire at 60-day, 30-day, and 24-hour time lines
3. Review OCS/ODS web pages
   a. Links are contained in the O START with quick reference sheets
   b. Note report requirements are Different from OCS that ODS. OCS must pay out of pocket for a hotel Saturday night and report early Sunday morning. ODS has

lodging provided Saturday night and reports to ODS for check in later Sunday afternoon. The checks in locations are also different locations on the same base.

Qualifications

1. PQS
   a. Line items shall be signed off by personnel authorized on the Command Qualifiers list.
   b. Review the CNRC 1500 instruction for guidance on required timelines.
   c. Review the CNRC 1136 instruction for applicable PQS.
   d. Contact Command Trainer for scheduling PQS Board.
2. JQR
   a. Line items shall be signed off by personnel authorized on the Command Qualifiers list.
   b. Review the CNRC 1500 instruction for guidance on required timelines.
   c. Review the CNRC 1136 instruction for applicable JQR.
   d. Contact Command Trainer for scheduling JQR Board.
3. Video Board
   Boards can be held virtually from anywhere with a reliable internet source and capable media device in accordance with command policies.